

Enrollment is simple.
Just tell us about your gift.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

- Yes*, I/we have made a planned or deferred gift to Beatitude House.
- I /We prefer to remain anonymous.
- I/We have made the following type of planned gift to Beatitude House:
- ___ Bequest in will/trust
 - ___ Beneficiary designation
 - ___ Life Insurance
 - ___ IRA or Pension
 - ___ Charitable Gift Annuity
 - ___ Other: _____
- (Optional) The current estimated value of my/our future gift is \$_____

Please complete form and return to:
Beatitude House
Attn: Development Department
238 Tod Lane
Youngstown, OH 44504



Beatitude House is a proud member of the *Leave a Legacy* program. Visit www.leavealegacy.org for more information.



Serving Mahoning, Trumbull & Ashtabula Counties
238 Tod Lane, Youngstown, OH 44504
330-744-3147 • beatitudehouse.com

Please Note: Beatitude House and its associates and employees are not engaged in rendering legal or tax advice. For advice or help, please consult your attorney. State laws govern wills, trusts and charitable gifts made in a contractual agreement. Please seek legal advice when considering these types of gifts.

You can leave a
Legacy



Provide **hope** and **opportunity** to homeless women and children in your community far into the future by joining the **Beatitude House Legacy Society**.

With a planned gift, you will leave a **lasting** legacy and will help ensure our program is offered to those in need now- and for **generations** to come.





The Beatitude House Legacy Society is a giving society that honors and celebrates the **dedicated**, generous donors that have made a life commitment to the **mission** of Beatitude House through a planned gift.

These future gifts contribute to the growth and **success** of Beatitude House and will benefit **generations** to come.

What are the benefits?

Members are provided a certificate of membership to **honor** their generous support and are often offered many **advantages** including reduced estate taxes, current income tax deductions and reduced or avoided capital gains taxes.

How do I join?

We are proud to extend an invitation to the **Beatitude House Legacy Society** to those who notify us of their planned gift.

To ensure that records accurately reflect your intentions, please fill out the **included form** or contact the Development Department (330-744-3147) to communicate your plans.

Wills

Charitable bequest gifts made through a will are a popular way of providing long-term support for the families of Beatitude House and are easy to establish.

Here are some basic options to consider and discuss with your attorney or legal representative:

1. Leave an exact dollar amount or specific possession
2. Designate all or a percentage of your total assets
3. After all other bequests are distributed from your will, the “rest & residue” of your estate becomes a gift
4. Divide the “rest & residue” on a percentage basis among your chosen charities.

When naming Beatitude House in your will, please use the following legal information:

Beatitude House
238 Tod Lane
Youngstown, OH 44504
330-744-3147
Federal ID #:
34-1662460

Beneficiary Designation

Consider designating Beatitude House as the beneficiary of your life insurance or retirement assets.

Policies and assets that are no longer needed for family security or their original purpose can be an excellent basis for establishing a gift to Beatitude House. When transferred irrevocably, gifts may result in tax advantages.

Gift Annuities

Gift annuities both provide you with fixed annuity payments for the rest of your life and Beatitude House with generous support for our homeless women and children.

You receive a charitable deduction the year the annuity is established and receive guaranteed income for life, part of which is tax-free. Following your death, Beatitude House will receive the remainder of the gift.

Join other members of the Beatitude House Legacy Society by simply remembering Beatitude House in your estate plans.

“Beatitude House has been successfully doing God’s work in support of disadvantaged women and their children for over 20 years. Financially supporting Beatitude House has enabled this good work to grow both its programs and its facilities. It is both a blessing and a pleasure to be able to contribute to the future successes of Beatitude House.”