



3110 E Thunderbird Road, Suite 100
Phoenix, Arizona 85032
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www.AzHelpingHands.org

ESTATE AND PLANNED GIVING

Including Arizona Helping Hands in your final giving plans allows you to enjoy the benefits of a gift to charity, while leaving a lasting legacy.

There are many ways to benefit AHH as you make final giving plans:

- Name Arizona Helping Hands as a beneficiary in a Will or Living Trust.
- Make a gift of cash or appreciated securities to establish a charitable gift annuity with Arizona Helping Hands.
- Name Arizona Helping Hands as the beneficiary of a paid life insurance policy or a retirement account.

To include Arizona Helping Hands in your plans, you will need the following information:

Legal Name: Arizona Helping Hands
Legal Address: 3110 E. Thunderbird Road, Suite 100, Phoenix, Arizona 85032
Federal Tax ID: 86-0935988
Type of Organization: 501(c)(3) nonprofit

TYPES OF BEQUESTS

Specific Bequest. A specific bequest involves making a gift of a specific asset such as real estate, a car, other property or a gift for a specific dollar amount. For example, you may wish to leave your home or \$15,000 to Arizona Helping Hands.

Percentage Bequest. Another kind of specific bequest involves leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 15% of your estate to Arizona Helping Hands.

Residual Bequest. A residual bequest is made from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 25% of the residue of your estate to Arizona Helping Hands.

Contingent Bequest. A contingent bequest is made to charity only if the purpose of the primary bequest cannot be met. For example, you could leave specific property, such as a vacation home, to a relative, but the bequest language could provide that if the relative is not alive at the time of your death, the vacation home will go to Arizona Helping Hands.

BEQUEST BENEFITS

A bequest is generally a revocable gift, which means it can be changed or modified at any time. You can choose to designate that a bequest be used for a general or specific purpose so you have the peace of mind knowing that your gift will be used as intended. Bequests are exempt from federal estate taxes. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes, resulting in a larger inheritance for your heirs.

BEQUEST LANGUAGE

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to Arizona Helping Hands in your estate plan. We have provided some basic bequest language to assist you and your attorney.

SAMPLE/SUGGESTED BEQUEST LANGUAGE

1. SPECIFIC BEQUEST

If you are considering making an outright bequest to Arizona Helping Hands, we recommend the following language:

BEQUEST OF A SPECIFIC DOLLAR AMOUNT

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to Arizona Helping Hands, a nonprofit organization located at 3110 E. Thunderbird Road, Suite 100, Phoenix, AZ 85032, Federal Tax ID #86-0935988, for Arizona Helping Hands general use and purpose.

Bequest of Specific Personal Property

I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to Arizona Helping Hands, a nonprofit organization located at 3110 E. Thunderbird Road, Suite 100, Phoenix, AZ 85032, Federal Tax ID #86-0935988, for Arizona Helping Hands general use and purpose.

BEQUEST OF SPECIFIC REAL ESTATE

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to Arizona Helping Hands, a nonprofit organization located at 3110 E. Thunderbird Road, Suite 100, Phoenix, AZ 85032, Federal Tax ID #86-0935988, for Arizona Helping Hands general use and purpose.

2. PERCENTAGE BEQUEST

If you are considering making a bequest of a percentage of your estate to Arizona Helping Hands, we recommend the following language:

I hereby give, devise and bequeath ___ percent (___%) of my total estate, determined as of the date of my death, to Arizona Helping Hands, a nonprofit organization located at 3110 E. Thunderbird Road, Suite 100, Phoenix, AZ 85032, Federal Tax ID #86-0935988, for Arizona Helping Hands general use and purpose.

3. RESIDUAL BEQUEST

I hereby give, devise and bequeath to Arizona Helping Hands, a nonprofit organization located at 3110 E. Thunderbird Road, Suite 100, Phoenix AZ, 85032 Federal Tax ID #86-0935988, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for Arizona Helping Hands general use and purpose.

4. CONTINGENT REQUEST

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to Arizona Helping Hands, a nonprofit organization located at 3110 E. Thunderbird Road, Suite 100, Phoenix AZ, 85032 Federal Tax ID #86-0935988, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for Arizona Helping Hands general use and purpose.

CONTACT US

Please contact us if you have any questions about how to make a bequest to Arizona Helping Hands or to request any additional information that might be helpful to you and your attorney as you consider making a bequest to us.

If you have included a bequest for Arizona Helping Hands in your estate plan, please contact us at jsprayberry@azhelpinghands.org to let us know. We would like to thank you and recognize you for your gift.

THE DONALDSON LEGACY SOCIETY OF ARIZONA HELPING HANDS

The Donaldson Legacy Society was established to honor and thank our members and community leaders who have included the Arizona Helping Hands Endowment Fund in their charitable bequests and estate plans by naming as a beneficiary to wills, living trusts, IRAs or other life-income gifts. The Arizona Helping Hands Endowment Fund was established to diversify the way Arizona Helping Hands receives support and to provide funding for the organization well into the future. For more information on joining the Donaldson Legacy Society please contact Jodie Sprayberry jsprayberry@azhelpinghands.org or (480) 889-0604.