

Advisor's Guide for Planned Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name the Van Wezel Foundation in a will or trust please use the following suggested language:

Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to the Van Wezel Foundation, Sarasota, FL, (EIN 59-2807055) all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Bequest Language

You can also name the Foundation as a beneficiary of a specific amount from your estate:

I give and devise to the Van Wezel Foundation, Sarasota, FL, (EIN 59-2807055) the sum of \$ _____ (or "____ shares of _____ stock") to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language

the Foundation can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert individual heir's name) is not living at the time of my demise, I give and devise the Van Wezel Foundation, Sarasota, FL, (EIN 59-2807055) the sum of \$ (or "all" or " _____ percentage of the residue of my estate") to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:

Van Wezel Foundation's Broker: PNC Bank

DTC: 2616

Account number: 21-50-001-6935671

Tax ID Number: 59-2807055

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Suzanne Hudson-Smith, CFRE, Associate Director of Leadership Gifts at shudsonsmith@vwfoundation.org

Legal name: Van Wezel Foundation

Tax ID number: 59-2807055

Address: 777 N Tamiami Trail 3rd Floor, Sarasota, FL 34236

Note to Attorneys, Accountants and other Professional Advisors

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into well-crafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based on information we provide.

If you have any questions or concerns, please call 941-241-4178 or email shudsonsmith@vwfoundation.org.

Disclosure: This information is not intended as legal advice. For more specific advice, please consult your attorney or financial adviser.