



When you make a planned gift to Habitat for Humanity Vail Valley in your estate or long-term financial plans, you help ensure that we'll be here—committed to decent and affordable homeownership—for years to come.

The following language may help you and your attorney when drawing up a bequest that meets your needs.

### **General Bequest**

If you intend to leave an outright gift of cash, securities or other property by designating a specific dollar amount, a particular asset or a fixed percentage of your estate to Habitat for Humanity Vail Valley to be used for general purposes:

*"After taking care of all expenses, debts and other provisions, I give, devise and bequeath \_\_\_ percent of my estate as an unrestricted gift [or \$\_\_\_ if a specific amount] to Habitat for Humanity Vail Valley, a charitable organization. [Tax ID: 84-1278922] currently with administrative offices at 455 Nottingham Ranch Road, Avon, CO 81620."*

### **Specific Bequest**

If you intend to make an outright bequest for a specific purpose, such as to support advocacy or disaster response:

*I, [name], of [city, state, ZIP], give, devise and bequeath to Habitat for Humanity Vail Valley [\$ written amount or percentage of the estate or description of property] for its charitable purposes, as an unrestricted gift OR including but not limited to \_\_\_\_\_ use and purpose.*

### **Contingency bequest**

If you wish to make a contingency gift so that Habitat for Humanity Vail Valley will receive a portion of your estate if your named beneficiary does not survive you:

*If any of the beneficiaries named in this will should die before becoming entitled to receive their distributive share of my estate, I direct my trustee to pay or transfer the share to which such beneficiary would otherwise be entitled to Habitat for Humanity Vail Valley for its unrestricted use and purpose.*

### **Remaining Interest Will or Trust Bequest**

*I give, devise and bequeath to Habitat for Humanity Vail Valley, a charitable organization. [Tax ID: 84-1278922] currently with administrative offices at 455 Nottingham Ranch Road, Avon, CO 81620.*

### **Investment Asset Will or Trust Bequest Language**

*I give, devise and bequeath to Habitat for Humanity Vail Valley, a charitable organization. [Tax ID: 84-1278922] currently with administrative offices at 455 Nottingham Ranch Road, Avon, CO 81620, \_\_\_\_\_ shares of common stock of \_\_\_\_\_ owned by me at my death as these shares shall exist at the date of my death, as an unrestricted gift.*

**Property or Real Estate Will or Trust Bequest Language**

*I give, devise and bequeath to Habitat for Humanity Vail Valley, a charitable organization. [Tax ID: 84-1278922] currently with administrative offices at 455 Nottingham Ranch Road, Avon, CO 81620, all of my right, title and interest in and to that certain real estate located at [Donor Address or Description of Property], for its general use and purposes*

Please contact us at [elyse@habitatvailvalley.org](mailto:elyse@habitatvailvalley.org) or 970.748.6718 if you have any questions. Then, consult with your tax advisor and lawyer to determine which planned gift strategy is best for you.

Thank you for including Habitat for Humanity Vail Valley in your estate plan and for helping families attain safe, affordable housing.

.....  
The information you provide here will ensure that we have accurate records so that we can provide the best possible stewardship of your gift. This is not a binding legal document, and your information will be kept confidential.

Please contact us at [elyse@habitatvailvalley.org](mailto:elyse@habitatvailvalley.org) or 970.748.6718 if you have any questions. Then, consult with your tax advisor and lawyer to determine which planned gift strategy is best for you.

Date of estate plan or designation:

I have supported Habitat for Humanity through the following type(s) of gift:

- Will provision
- Life insurance beneficiary
- Gift annuity
- Living trust
- Charitable remainder trust
- Real estate

Stocks or bonds

Retirement account

Other

- Is this gift revocable or irrevocable?
  - This gift is revocable (can be changed).
  - This gift is irrevocable (cannot be changed).
- Is this a percentage or specified amount?
  - This gift is a percentage.
  - This gift is a specific amount.
  - This gift will be a portion of the remainder.
- Please tell us about your gift designation:
  - I have planned this gift in honor or memory of someone.
  - I would like this gift to provide for a specific purpose.
  - Habitat for Humanity may use this gift where needed most.
- If you would like, please share with us what influenced your decision to leave an estate gift to Habitat for Humanity.
- Habitat for Humanity likes to recognize our incredibly generous legacy supporters. Would you like to be recognized in our publications?
  - Yes, please list my/our name(s) as part of Habitat for Humanity publications.
  - No, please do not list my/our name(s).

Please confirm your contact information:

First, Last name (required)

Address

Address 2

City, State Zip

Email (required)

Phone

Date of birth

Date

A donor advised fund (DAF) gives you the flexibility to recommend how much and how often money is granted to the Habitat for Humanity Vail Valley and other qualified charities. You can recommend a grant or recurring grants now to make an immediate impact or use your fund as a tool for future charitable gifts.

You can also create a lasting legacy by naming the Habitat for Humanity Vail Valley the beneficiary of the entire account or a percentage of the fund. With a percentage, you can create a family legacy of giving by naming your loved ones as your successor to continue recommending grants to charitable organizations. Contact your fund administrator for a beneficiary form.