

# Sample Language to Designate U.S. Charitable Gift Trust® as the Beneficiary of Assets

U.S. Charitable Gift Trust® (“Gift Trust”) can be named as beneficiary of a bequest in a will, charitable remainder trust, annuity and individual retirement account (“IRA”) assets. A well-established plan made during your lifetime could help alleviate some of the negative impact taxes can have on assets that have grown significantly during your lifetime. A charitable bequest with a Donor-Advised Fund can benefit charities and help reduce your estate tax liability. Before you make any changes to your estate plan, you should always consult your financial, legal and/or tax advisor.\*

If the Gift Trust account is not established prior to death, please keep the original Application with your estate documentation and provide the Administrator with a copy. Please contact the Administrator, Ren, at 1-800-664-6901 for transfer instructions.

## **Bequest in will where the Gift Trust account was established prior to death:**

I bequeath \_\_\_\_\_ dollars (\$\_\_\_\_\_) [and/or the following described property, \_\_\_\_\_] [and/or \_\_\_\_\_ percent (\_\_\_\_\_% ) of my residual estate] to U.S. Charitable Gift Trust, Tax ID #31-1663020 to be added to the [insert account name] \_\_\_\_\_, account number \_\_\_\_\_.

## **Bequest in will where the Gift Trust account was not established prior to death:**

I bequeath \_\_\_\_\_ dollars (\$\_\_\_\_\_) [and/or the following describes property, \_\_\_\_\_] [and/or \_\_\_\_\_ percent (\_\_\_\_\_% ) of my residual estate] to U.S. Charitable Gift Trust, Tax ID #31-1663020 to be held in the subaccount known as the [insert account name] \_\_\_\_\_. I hereby direct my executor to take all steps necessary to establish such a subaccount within U.S. Charitable Gift Trust pursuant to the completed Donor Contribution Form as provided to my executor.

## **IRA or annuity designation where the Gift Trust account was established prior to death:**

Beneficiary: U.S. Charitable Gift Trust, Tax ID #31-1663020 to be added to the [insert account name] \_\_\_\_\_, account number \_\_\_\_\_.

## **IRA or annuity designation where the Gift Trust account was not established prior to death:**

Beneficiary: U.S. Charitable Gift Trust, Tax ID #31-1663020 to be held in the subaccount known as the [insert account name] \_\_\_\_\_, such subaccount to be established by my executor after my death. I hereby direct my executor to take all steps necessary to establish such a subaccount within U.S. Charitable Gift Trust pursuant to the completed Donor Contribution Form as provided to my executor.

## **Charitable Remainder Trust where the Gift Trust account was established prior to death:**

Remainder Beneficiary: U.S. Charitable Gift Trust, Tax ID #31-1663020 to be added to the [insert account name] \_\_\_\_\_, account number \_\_\_\_\_.

## **Charitable Remainder Trust where the Gift Trust account was not established prior to death:**

Remainder Beneficiary: U.S. Charitable Gift Trust, Tax ID #31-1663020 to be held in the subaccount known as the [insert account name] \_\_\_\_\_, such subaccount to be established by my trustee after my death. I hereby direct my trustee to take all steps necessary to establish such a subaccount within U.S. Charitable Gift Trust pursuant to the completed Donor Contribution Form as provided to my trustee.

\*Please consult with your financial and/or legal advisors prior to establishing any testamentary gift or trust. Information provided is general in nature and is provided for information purposes only. The designation of a charitable beneficiary or the designation of both a charity and a non-charitable beneficiary of an undivided IRA may limit the payout options available to the non-charitable beneficiary. Rules and regulations regarding wills and trusts vary at the state level, and laws of a specific state or laws relevant to a particular situation may affect the applicability, accuracy, or completeness of the information provided.

If you have any questions about this form, please contact U.S. Charitable Gift Trust at 1-800-664-6901.

Eaton Vance Distributors Inc. is a paid solicitor of the Gift Trust, receiving compensation as described in the Gifting Booklet.