



# PLANNED GIVING

### Sample Language for Charitable Bequests in Will or Trusts and/or Life Insurance

Thank you for considering including WGVU in your estate plans. When you include WGVU in your estate plans, you help ensure people of all ages will continue to have access to information and ideas that educate, inform, inspire, and entertain the communities we serve. We are truly grateful to have a friend like you who sees our value and wants to invest in our future!

Please share this sample language below with your professional counsel. WGVU Public Media does not provide any legal or tax advice.

#### **Bequest of a Percent**

"I give, devise, and bequeath to WGVU Public Media (Federal Tax ID #38-1684280), a nonprofit organization located at 301 Fulton St. W, Grand Rapids, MI, 49504, \_\_\_\_\_\_ percent (\_\_\_\_\_%) to be used for the support of WGVU Public Media's unrestricted charitable purpose (*or* insert name of fund and purpose)."

#### **Bequest of a Specific Dollar Amount**

"I give, devise, and bequeath to WGVU Public Media (Federal Tax ID #38-1684280), a nonprofit organization located at 301 Fulton St. W, Grand Rapids, MI, 49504, \_\_\_\_\_ and no/100 dollars (\$DOLLARS) to be used for the support of WGVU Public Media's unrestricted charitable purpose (*or* insert name of fund and purpose)."

### **Residual Bequest**

"I give, devise, and bequeath to WGVU Public Media (Federal Tax ID #38-1684280), a nonprofit organization located at 301 Fulton St. W, Grand Rapids, MI, 49504 *all or a percentage* of the rest, residue, and remainder of my estate to be used for WGVU Public Media's unrestricted charitable purpose (*or* insert name of fund and purpose)."

#### Life Insurance

Adding WGVU Public Media as a sole or partial beneficiary is easy:

- 1. Log in to your account online or contact your life insurance plan administrator to determine how to change your beneficiary designations for your account.
- 2. Determine what amount you would like to direct to WGVU: Indicate 100% if WGVU will be the sole beneficiary or list a smaller percentage if WGVU will be a partial beneficiary.
- 3. Use the following information to add WGVU as a beneficiary, just as you would an individual beneficiary:

WGVU Public Media 301 Fulton St. W, Grand Rapids, MI 49504 (616) 331-6666

Some life insurance administrators will need less information than what is provided here. The WGVU Tax ID can be entered under Social Security number.

#### **Important Information**

WGVU Public Media 301 Fulton St. W. Grand Rapids, MI 49504

Federal Tax ID: 38-1684280

Please note, WGVU Public Media is licensed through Grand Valley State University and as such we share one Federal Tax ID number.

## **WGVU Planned Giving Contact**

Molly O'Brien
Major and Planned Giving Officer
<a href="mailto:obrimoll@gvsu.edu">obrimoll@gvsu.edu</a> | 616.331.6528

So that we may best steward your future gift, please notify WGVU's Planned Giving Officer, Molly O'Brien, of your gift's intended purpose, and your wishes for recognition or anonymity. Because every gift plan is tailored to your needs, and state laws vary, we recommend that you consult with your legal, tax and/or financial advisors before finalizing your plans.

Planned Giving at WGVU is supported by: