



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 Academy of the Sacred Heart 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, bequeath and devise all (or ____ percent) of the rest, residue and remainder of my estate to the Board of Trustees of The Academy of the Sacred Heart, a corporation of the State of Missouri, located in St. Charles, MO, for the general and educational purposes of said Corporation.

Specific Bequest Language

You can also name The Academy as a beneficiary of a specific amount from your estate:

I give, bequeath, and devise to the Board of Trustees of The Academy of the Sacred Heart, a corporation of the State of Missouri, located in St. Charles, MO, the sum of \$_____, (or, ____ percent of the rest, residue and remainder of my estate) to be used to support _____ (name of program or academic area.) In the event the need to support _____ no longer exists, the Board of Trustees shall be and hereby are authorized to use this bequest for a purpose in keeping with the spirit of this gift in the best interest of the Academy.

Contingent Bequest Language

The Academy 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 name) is not living at the time of my demise, I give and devise to the Board of Trustees of The Academy

of the Sacred Heart (Tax ID #43-0662494), located in St. Charles, MO, the sum of \$ _____ (or all or a 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

Legal Name: The Academy of the Sacred Heart

Tax I.D. Number: 43-0662494

DTC Number: 793

Account #: 10178235

Incorporated in: St. Charles, MO

Please contact us for a stock transfer form.

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 **Dr. Susan Tyree Dempf, Head of School**.

For Gifts of Securities, please contact the Office of Gift Planning for transfer instructions.

Note to Attorneys, Accountants and other Professional Advisors

Thank you for helping your client with their charitable planning. The Office of Gift Planning is available to discuss with you or your client, their charitable intentions to help ensure the gift makes the desired impact. If you need information or if you have any questions or concerns, please contact **Dr. Susan Tyree Dempf**, at **636-946-6127**

Ext. 1102 or
sdempf@ash1818.org.