



## Including WINiT In Your Estate Plan

Bequests and other testamentary gifts by generous supporters can be a significant source of financial support for the organization. The continuation and expansion of this tradition of remembrance will contribute to the future financial strength and continued excellence of WINiT.

A gift to the organization through your estate plan qualifies you as a member of WINiT Legacy Partners, created to recognize and thank Donors whose foresight is building the future of WINiT.

You can make a specific gift to WINiT in the form of cash, securities, real estate or other property through your will, codicil or trust instrument. You can also designate WINiT as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries.

Another way to include WINiT in your estate plan is to name the organization as a beneficiary of your retirement plan or life insurance policy. A bequest or trust provision for the benefit of WINiT may qualify your estate for an estate **tax charitable deduction**.

Sample testamentary language:

*"I give (dollars) or (a specific asset, such as securities, real estate or other property) or (all) or (percent of the rest, residue, and remainder of my estate) to the WINiT organization (for its general purposes) or (for the following purpose):"*

While unrestricted gifts allow the organization to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific event, program or activity at WINiT. In order to ensure that the evolving educational needs of future generations of members are met, it is advisable to include the following language with restricted gifts:

*"In the event that at some future time due to changed circumstances, in the judgment of the WINiT organization, it becomes impractical to apply my bequest to the designated purpose(s), the WINiT organization shall make such modifications as will appropriately recognize my interests in coordination with the WINiT organization priorities."*

If you wish to document your request at this time, we encourage you to speak with your attorney and complete the form on page two (2) of this document. For more detailed information on including the WINiT organization in your estate plan, please contact: WINiT, 35 Talcottville Road, Suite 31- 111, Vernon, CT 06066. Phone: 860- 422- 5366 E- mail: [info@womenintravel.org](mailto:info@womenintravel.org)

# Documenting Your Bequest Intention



In order to support the educational mission of the WINiT organization, I have included a noncontingent bequest to WINiT as part of my estate plan.

A copy of the relevant provision of my will, trust or beneficiary designation form is attached. If I make any change to this provision, I will notify the WINiT organization of such change.

Name

Street Address

City

State

Zip Code

Home Telephone

Business Telephone

Current Value of Bequest

Date of Birth (for Gift Recognition)

Signature

Date

## Gift Recognition:

If you will be at least 65 years old as of June 30 of the current fiscal year, you may be eligible to receive gift recognition at a discounted value based on your age. However, if WINiT will receive the non-contingent bequest upon the death of your spouse or another individual, gift recognition may be based upon the spouse or individual's current age. Please provide the following information for that individual.

Name

Date of Birth

## Submit Completed Form:

E-mail: [info@womenintravel.org](mailto:info@womenintravel.org)

WINiT

35 Talcottville Road

Suite 31-111

Vernon, Connecticut 06066

Phone: 860-422-5366