

Leaving a Legacy Through Your Will or Estate Plan

Whether you are creating a will for the first time or updating an existing one, including St. Margaret's House, Inc. in your estate plan is a meaningful way to ensure your commitment to supporting women and children continues. A legacy gift costs nothing today, but can have a lasting impact for years to come.

Getting Started: What You'll Need

To include a charitable bequest, you'll need to:

- Choose what type of gift you'd like to make (a specific amount, a percentage, or the remainder of your estate)
- Share our legal information with your estate planner or attorney:
 - Legal Name: **St. Margaret's House, Inc.**
 - Address: **117 N Lafayette Blvd. South Bend, IN 46601**
 - Tax ID (EIN): **35-1913328**
- Let us know! You can fill out our Bequest Intent Form or call us confidentially at 574-234-7795. Whether you want to be acknowledged as a Legacy Donor or held in confidence within the leadership team of St. Margaret's House, we will always honor your preferences.

Sample Bequest Language

Here is language you can share with your attorney or estate planner to include St. Margaret's House in your plans:

For a general bequest (a specific dollar amount):

"I give and bequeath the sum of \$_____ to St. Margaret's House, a nonprofit organization located at 117 N Lafayette Blvd, South Bend, IN 46601, Federal Tax ID #35-1913328, to be used for its general charitable purposes."

For a residuary bequest (a percentage of your estate):

"I give and bequeath ____% of the rest, residue, and remainder of my estate to St. Margaret's House, a nonprofit organization located at 117 N Lafayette Blvd, South Bend, IN 46601, Federal Tax ID #35-1913328, to be used for its general charitable purposes."

For a contingent bequest (if another beneficiary cannot inherit):

"If [name of primary beneficiary] does not survive me, I give and bequeath their designated gift to St. Margaret's House, a nonprofit organization located at 117 N Lafayette Blvd, South Bend, IN 46601, Federal Tax ID #35-1913328, to be used for its general charitable purposes."

Bequest Intention Form

Thank you for including St. Margaret's House in your estate plans. Your legacy gift helps ensure that our mission continues to serve future generations.

This form is not legally binding, and all information will be kept strictly confidential.

Donor Information

Name(s): _____

Address: _____ City: _____

State: _____ ZIP: _____ Phone: _____

Email: _____

Bequest Details

I/we have made provisions for St. Margaret's House in the following way (check all that apply):

- Will
- Living Trust
- Retirement Plan Beneficiary Designation
- Life Insurance Policy
- Other (please describe): _____

This gift is:

- A specific amount: \$ _____
- A percentage of my estate: _____ %
- The remainder/residue of my estate
- Other (please describe): _____

Estimated current value of this future gift (optional): \$ _____

Recognition

- You may publish my/our name(s) as part of your Legacy Society to inspire others.

Please list as: _____

- I/we prefer to remain anonymous.

Signature

Donor Signature: _____ Date: _____

Co-Donor Signature: _____ Date: _____

Questions?

Please contact Lauren Smyth, Senior Director of Development and Strategy for St. Margaret's House, at 574-234-7795 or lauren@stmargarethouse.org

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