# Bequest Intention Form

Mill Neck Foundation, Inc. | The 1947 Society

Thank you for including Mill Neck Foundation in your estate plans. This form lets us thank you, welcome you into The 1947 Society and honor your wishes. It is confidential, is not a legal document and creates no binding obligation. Please complete your plans with your attorney or advisor. Return it by email to donate@millneck.org or by mail to Mill Neck Foundation, Inc., 40 Frost Mill Road, Mill Neck, NY 11765.

## YOUR INFORMATION

Full name(s) _____ Phone _____

Street address _____ City _____ State _____ ZIP code _____

Email _____

## I HAVE INCLUDED MILL NECK FOUNDATION IN MY ESTATE PLANS THROUGH

- ☐ My will
- ☐ My living or revocable trust
- ☐ An IRA, 401(k), 403(b) or other retirement plan beneficiary designation
- ☐ A life insurance beneficiary designation
- ☐ A donor advised fund beneficiary designation
- ☐ Other: _____

## FORM OF MY GIFT

- ☐ A specific amount of $ _____
- ☐ A percentage of my estate (%): _____
- ☐ All or part of the residue of my estate
- ☐ A specific asset: _____

Approximate value of my gift today (optional, kept confidential) _____

## PURPOSE OF MY GIFT

- ☐ Unrestricted, for the general charitable purposes of Mill Neck Foundation (recommended)
- ☐ Restricted, please discuss with us first. Purpose: _____

## RECOGNITION AND ADVISOR

Please list my name in The 1947 Society as _____

- ☐ You may list my name in The 1947 Society
- ☐ I prefer that my gift remain anonymous

Attorney or advisor name and firm (optional) _____ Phone or email _____

Signature (type or sign your full name) _____ Date _____



Mill Neck Foundation, Inc. is a 501(c)(3) nonprofit organization. Gifts are tax deductible to the fullest extent allowed by law.

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## Sample language for your attorney

Please share the language below with your attorney or advisor. To make sure your gift is directed as you intend, use our full legal name and federal tax ID.

### OUR LEGAL INFORMATION

**Legal name: Mill Neck Foundation, Inc.**

Address: 40 Frost Mill Road, Mill Neck, NY 11765

Federal tax ID (EIN): 11-2497863

### UNRESTRICTED GIFT (RECOMMENDED)

“I give, devise, and bequeath to Mill Neck Foundation, Inc., a nonprofit corporation located at 40 Frost Mill Road, Mill Neck, New York 11765, Federal Tax ID 11-2497863, the sum of $_____ (or _____% of my estate), to be used for its general charitable purposes.”

### RESIDUAL GIFT

“I give, devise, and bequeath all (or _____%) of the rest, residue, and remainder of my estate, both real and personal, to Mill Neck Foundation, Inc., located at 40 Frost Mill Road, Mill Neck, New York 11765, Federal Tax ID 11-2497863, for its general charitable purposes.”

### CONTINGENT GIFT

“If [name of primary beneficiary] does not survive me, I give, devise, and bequeath $_____ (or _____% of the residue of my estate) to Mill Neck Foundation, Inc., located at 40 Frost Mill Road, Mill Neck, New York 11765, Federal Tax ID 11-2497863, for its general charitable purposes.”

### RESTRICTED GIFT (PLEASE DISCUSS WITH US FIRST)

“I give, devise, and bequeath to Mill Neck Foundation, Inc., located at 40 Frost Mill Road, Mill Neck, New York 11765, Federal Tax ID 11-2497863, the sum of $_____ (or _____% of my estate), to be used for the following purpose: _____. If this purpose can no longer be fulfilled, the gift shall be used for the general charitable purposes of Mill Neck Foundation, Inc.”

### RETIREMENT PLANS, LIFE INSURANCE AND DONOR ADVISED FUNDS

Name “Mill Neck Foundation, Inc., Federal Tax ID 11-2497863” as a full or partial beneficiary on the beneficiary designation form provided by your plan administrator, insurance company or donor advised fund sponsor. Retirement assets left to a charity can pass free of income and estate taxes. Please consult your tax advisor about your situation.

> Mill Neck Foundation does not provide legal or tax advice. Please consult your attorney or tax advisor about your specific circumstances.



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