

BENEFICIARY DESIGNATION

Create a vibrant future for HomeStart through a beneficiary designation



Discover one of the simplest ways to support HomeStart through your estate—by naming us as a beneficiary of your assets.

A gift through **beneficiary designation** can help you:

- ✓ Create a future gift for HomeStart
- ✓ Retain control of your assets during your lifetime
- ✓ Maintain flexibility if your plans change
- ✓ Enjoy potential estate tax benefits, such as reducing or eliminating estate taxes.

PLANNED GIVING THROUGH BENEFICIARY DESIGNATION

Beneficiary Designations are often the easiest type of planned gift to do. All you have to do is name HomeStart, Inc. as a full or partial beneficiary of the remainder of your IRA, 401(k), 403(b), tax-deferred annuity, financial accounts or other qualified retirement plans.

Simply request a **change of beneficiary form** for your plan administrator and name HomeStart, Inc. as a partial (percentage or dollar value) or full beneficiary upon your passing.

Types of Assets to Consider

- Retirement Plan, 401K, 403(b) or IRA
- Life Insurance
- Bank Accounts
- Donor Advised Funds
- Investment Accounts
- Commercial Annuities

WAYS TO INCLUDE HOMESTART:

- A gift of a particular amount of money. For example, you designate \$25,000.
- A gift of a percentage. For example, you designate 25% of the account's value
- Name HomeStart as a contingent beneficiary if other beneficiaries have already passed.

IMPORTANT INFORMATION:

HomeStart's Legal Name: HomeStart, Inc.

HomeStart's Tax ID: 04-3311270



The **HomeStart Legacy Circle** honors those who have arranged a planned gift for HomeStart. Anonymous members are welcomed.

Your gift provides essential resources to sustain and strengthen HomeStart's mission, meet unforeseen challenges, and plan for the future. Best of all, by including the organization in your plans, you can lead the way and inspire others in the HomeStart community.

The Development Office is pleased to provide you with information on gifts through your estate and other planned gifts. Contact Cindy Rubin at (857) 415-2230 or rubin@homestart.org. We look forward to hearing from you!