



ESTATE PLANNING GUIDE

Estate planning provides for the future needs of your family and loved ones. It can also ensure charitable organizations, such as the IHM Sisters, are remembered. By including a bequest provision in your will or with a codicil, you can continue to support the sisters well into the future.

CREATING YOUR LEGACY

When making your planned gift, it is important to have a will or trust that clearly states your intent. The following includes a few examples of suggested bequest language to benefit the IHM Sisters. We encourage you to consult with your tax advisor, attorney, and/or financial planner when preparing your estate plans.

- **Percentage of estate for unrestricted purpose** – “I give, devise, and bequeath to the Sisters, Servants of the Immaculate Heart of Mary, Monroe, Michigan, Inc., _____ percent (%) of the rest, residue, and remainder of my estate as an unrestricted gift to be used at the discretion of the IHM Sisters ...”
- **Specific amount for unrestricted purposes** – “I give, devise, and bequeath to the Sisters, Servants of the Immaculate Heart of Mary, Monroe, Michigan, Inc., the sum of \$_____ to be used at the discretion of the IHM Sisters ...”
- **Specific amount for specific purposes** – “I give, devise, and bequeath to the Sisters, Servants of the Immaculate Heart of Mary, Monroe, Michigan, Inc., the sum of \$_____ to be used for _____ (example: retirement, ministry or area of greatest need) by the IHM Sisters ...”
- **IRA, Retirement Plan or Life Insurance Beneficiary** – to name the IHM Sisters as the beneficiary of one of these plans, please request a beneficiary designation form from your plan’s administrator.

NAMING THE SISTERS IN YOUR ESTATE PLANS

- As a 501(c)(3) organization, our legal name is: Sisters, Servants of the Immaculate Heart of Mary, Monroe, Michigan, Inc. Our Tax ID number is: 38-1359581.

DESIGNATING THE PURPOSE OF YOUR BEQUEST

- **Unrestricted** – The most useful type of bequest is unrestricted, allowing the funds to be allocated by the IHM Sisters wherever the need is greatest.
- **Restricted** – Designate your bequest to support IHM Sisters in retirement, ministry or area of greatest need.

FUTURE OF HOPE LEGACY SOCIETY MEMBERSHIP

- By remembering the IHMs in your will, you can become a member of the Future of Hope Legacy Society. This society was established to recognize donors who have made arrangements to give a gift through their estate plans and is comprised of individuals who share our mission, vision and values.
- Completing the Confidential Statement of Planned Gift Intention form enrolls you in the Legacy Society.

CONTACT INFORMATION

- We are grateful for all notifications of planned gifts. To discuss planned giving options or to notify us that you have made a planned gift, please contact Marilyn S. Meadows, Director of Development, at 734-240-9861 or mmeadows@ihmsisters.org or by mail. Our address is: 610 West Elm Avenue, Monroe, Michigan 48162.