



## Bequest & Beneficiary Guide

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Leave a legacy that preserves Englewood's history. Including Englewood Historical Society (EHS) in your will, trust, or as a beneficiary is simple and impactful.

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### 1) Three Easy Ways to Give

- **Will or Revocable Trust Bequest**

Leave a specific amount, a percentage of your estate, or your residue (what remains after other gifts/expenses).

- **Retirement Plan Beneficiary**

Name EHS on your IRA/401(k)/403(b) via your plan's beneficiary form.

- **Insurance / Financial Accounts**

List EHS as beneficiary of a life insurance policy or POD/TOD bank/brokerage account.

Most legacy gifts are revocable, you can update them anytime.

### 2) Sample Will/Trust Language (share with your attorney)

- Specific Amount

"I give \$[amount] to Englewood Historical Society, [address], Tax ID 222248305, for its general charitable purposes."

- Percentage of Estate

"I give [\_\_]% of my estate to Englewood Historical Society, [address], Tax ID 222248305, for its general charitable purposes."

- Residuary Gift

"I give all (or \_\_%) of the residue of my estate to Englewood Historical Society, [address], Tax ID 222248305, for its general charitable purposes."

- Optional restriction

"to support [program/endowment]. If this use becomes impracticable, EHS's Board may apply the gift to the closest related purpose consistent with my intent."

### 3) How to Name EHS as a Beneficiary (no will change needed)

Ask your provider for a beneficiary designation form, then list:

Beneficiary: Englewood Historical Society • Tax ID (EIN): 222248305

Address: P.O. Box 8136, Englewood, New Jersey 07631 • Type: 501(c)(3) public charity

Share: [\_\_]% or 100%

Common options: IRA/401(k)/403(b), life insurance, bank/brokerage POD/TOD.

### 4) Join the EHS Heritage Circle (Recognition is optional)

1. Complete your will/beneficiary forms.

2. Tell us via our short, non-binding EHS Heritage Circle Letter of Intent (LOI) so we can thank and steward you.
    - Review Letter of Intent document
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### **Organization Information (for your advisor)**

Legal name: Englewood Historical Society

Tax ID (EIN): 222248305

Address: P.O. Box 8136, Englewood, New Jersey

Status: 501(c)(3) public charity

Contact: Jane Kendall, President • [jane.e.kendall@icloud.com](mailto:jane.e.kendall@icloud.com) • 206-992-7069

Website: <https://englewoodhistoricalsocietynj.org/>

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### **Quick FAQ**

- Minimum gift? No, every commitment matters.
  - Remain anonymous? Yes. We honor anonymity requests.
  - Restrict my gift? Yes, please discuss with us to ensure feasibility.
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### **One-Minute Checklist**

- ☐ I selected my gift type (Will/Trust, Retirement, Insurance, POD/TOD)
- ☐ I used EHS's exact legal name, EIN, and address
- ☐ I completed and submitted any beneficiary forms
- ☐ I informed EHS and (optionally) returned the non-binding LOI

*EHS provides general information and sample language only and does not offer legal or tax advice. Please consult your attorney or tax advisor.*