**Planned Giving Through a Will or Revocable Trust or Beneficiary Designations**

Leaving a gift to the Boys & Girls Club of MetroWest in your estate is an easy way to benefit youth for generations to come and to leave a lasting legacy in your community. These bequests can give you tax beneﬁts, and provide the Clubs with critical resources to fulﬁll its mission into the future. Here are answers to some of the common questions we receive regarding planned giving.

A little careful planning today makes it possible for almost anyone to do more in the future to help those you love including family, friends, and charity.

**How can I include a gift to the Boys & Girls Club in my estate plan?**

A BEQUEST is perhaps the easiest way to make a lasting gift to the Boys & Girls Clubs of MetroWest. Once you have provided for the needs of your loved ones, you can make a revocable bequest that either leaves a specific percentage of your estate to the Foundation or a dollar amount of specific property.

This provision is made by making a simple addendum to your will or revocable trust.Many people choose to leave a set percentage of the residue of their estate for specified charitable uses. By doing so it is a correcting mechanism in case the estate should increase or decrease in value

There are many ways you can remember the Clubs in your estate plan! Some common options include naming the Club as a beneficiary in your:

* Will
* Trust
* Life Insurance Policy
* Retirement Plan Account (IRA, 401(k), 403(b), etc.)
* Charitable Remainder Trust

**Can I name the Club’s Foundation as the gift recipient?**

A gift to BGCMW is a great way to benefit the Club for many years to come.

To name the Foundation, you can use language similar to the following: “Boys & Girls Club of MetroWest.” ***TAX ID # 04-2387225***

To name the Club directly, you can use language similar to the following: “Boys & Girls Club of MetroWest, ***TAX ID # 04-2387225***.”

**Can I direct how my gift will be used?**

Yes, you can! These are commonly referred to as “restricted gifts.” We can work with you to create designated gifts that will support the Clubs’ efforts in the areas that are important to you. We often refer to these as “Donor Impact Funds.” If you have a specific wish, we want to ensure your intent is correctly understood and acted upon. Please contact us for more information on Donor Impact Funds and gifts for specific purposes.

**SAMPLE BEQUEST LANGUAGE**

**Boys & Girls Club Foundation Sample Language (for contributions to the Club’s endowed fund)**

“I give [Choose: \_\_\_% of my estate / the sum of $\_\_\_ / the real property described on the deed as \_\_\_\_\_\_\_\_ / the personal property described on the deed as \_\_\_\_\_\_\_\_ / all the rest, residue, and remainder of my estate / \_\_% of the rest, residue, and remainder of my estate] to the Boys & Girls Club of MetroWest**,*TAX ID # 04-2387225***) to further the purposes and objectives of the Boys & Girls Club as may be recommended by the CEO and approved by the trustees of the Foundation.”

**Boys & Girls Club Sample Language (for contributions to the Club’s general operations)**

“I give [Choose: \_\_\_% of my estate / the sum of $\_\_\_ / the real property described on the deed as \_\_\_\_\_\_\_\_ / the personal property described on the deed as \_\_\_\_\_\_\_\_ / all the rest, residue, and remainder of my estate / \_\_% of the rest, residue, and remainder of my estate] to the Boys & Girls Club of MetroWest ***TAX ID # 04-2387225***) to be used for its general charitable purposes.”

**Donor Impact Fund Sample Language (for contributions to the Club’s general operations)**

“I give [Choose: \_\_\_% of my estate / the sum of $\_\_\_ / the real property described on the deed as \_\_\_\_\_\_\_\_ / the personal property described on the deed as \_\_\_\_\_\_\_\_ / all the rest, residue, and remainder of my estate / \_\_% of the rest, residue, and remainder of my estate] to the Boys & Girls Club of MetroWest be used in accordance with the most recent Statement of Intent I have executed with the Boys & Girls Club of MetroWest no Statement of Intent exists at the time of my death, then I intend this gift to support \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [insert name of program/purpose]. If no such program is in existence then to further the purposes and objectives of the Boys & Girls Club as recommended by the CEO and approved by the Board of Directors.”

NOTE: The Statement of Intent mentioned above is a short agreement between the donors and the Boys & Girls Club, which includes background information provided by the donors and specifics on how the gift will be used. Donors may amend the Statement of Intent as often as they like without the necessity of amending their will or living trust.

We encourage you to seek the advice of personal legal and financial advisors when making your estate plans.

Once you have established a gift in your will, please let us know. We would like to thank you and recognize you in our Clubs.

If you or your attorney would like Boys & Girls Club of MetroWest to provide you with additional information that is specific to your goal and interest, please contact our Vice President, Laura Terzigni at 508-485-4912 x209.