

Sample Gift Language for your Will or Trust

A gift to UNITED DISABILITIES SERVICES in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

Residual Gift Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to UNITED DISABILITIES SERVICES, Inc., located in Lancaster, PA, all (*or* state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (*or* for the support of a specific fund or program).

Specific Gift Language

Naming UNITED DISABILITIES SERVICES as a beneficiary of a specific amount from your estate is easy:

I give and devise to UNITED DISABILITIES SERVICES, Inc., located in Lancaster, PA, the sum of \$_____ to be used for its general support (*or* for the support of a specific fund or program).

Contingent Gift Language

UNITED DISABILITIES SERVICES or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to UNITED DISABILITIES SERVICES, Inc., located in Lancaster, PA, the sum of \$ _____ (*or* all or a percentage of the residue of my estate) to be used for its general support (*or* for the support of a specific fund or program).

Retirement Plan Beneficiary Language

You may name UNITED DISABILITIES SERVICES as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming UNITED DISABILITIES SERVICES as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming UNITED DISABILITIES SERVICES as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support UNITED DISABILITIES SERVICES free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change of beneficiary form from your plan administrator. When you are done, please return the form to your plan administrator and notify UNITED DISABILITIES SERVICES. We can also assist you with the proper language for your beneficiary designation to UNITED DISABILITIES SERVICES.

Customized Language

If you or your attorney would like UNITED DISABILITIES SERVICES to provide you with customized beneficiary language that is specific to your goal and interest, please contact Larry Aubrey at 717-175-8763 or larrya@udservices.org.