

BHI Foundation

Bequest Information

Our legal name: BHI Foundation, Inc.

Our address: 8330 Allison Pointe Trail, Indianapolis, IN 46260

Our IRS tax identification number: 35-1680799

We are a tax-exempt, charitable institution listed in the Federal Internal Revenue Service

SAMPLE LANGUAGE FOR A BEQUEST

This language is for the illustration of various forms of bequests only. Always consult your professional advisor when making or revising your will.

RESIDUARY BEQUEST

“Residue” is a term to describe the portion of your estate that remains after all debts, expenses and specific bequests to others have first been fulfilled.

“All the rest, residue and remainder of my estate I give to the BHI Foundation, Inc., located in Indianapolis, Indiana, Tax ID 35-1680796, for its general purposes.”

SPECIFIC BEQUEST

“I give to the BHI Foundation, Inc., located in Indianapolis, Indiana, Tax ID 35-1680796, the sum of \$_____, for its general purposes.”

DONATION OF REAL ESTATE BY WILL

“I leave to the BHI Foundation, Inc., of Indianapolis, Indiana, the real property described as follows: (property description). I direct my Executor/Personal Representative to sell the above-described real property and distribute the proceeds to the BHI Foundation, Inc., located in Indianapolis, Indiana, Tax ID 35-1680796, for its general purposes.”



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BENEFICIARY DESIGNATION: DONATIONS OF LIFE INSURANCE, IRA, DONOR-ADVISED FUNDS (DAF) OR OTHER PENSION/RETIREMENT PLANS

A will typically does not dispose of assets such as life insurance and pension plans, which usually pass by “beneficiary designation.” A beneficiary designation is a contract between you and your insurance company or pension plan administrator to transfer the asset at your death to the person(s) or institution(s) you have designated (usually in the initial paperwork you completed to establish the asset). To designate the BHI Foundation as the beneficiary of such an asset, you should contact your insurance company or plan administrator and request a “change of beneficiary” form, which you can complete and return to them.

Note: Use Tax ID 35-1680796 in lieu of social security number for an organization.

PAYABLE ON DEATH (POD) AND TRANSFER ON DEATH (TOD) DESIGNATIONS

By setting up a POD or TOD designation on your bank accounts, certificates of deposit or brokerage accounts, you can transfer these assets at your death to the person(s) or charity(-ies) that you name. To set up a POD or TOD designation, contact your bank or investment advisor to fill out their beneficiary designation forms.

If you designate the BHI Foundation as the beneficiary of any of your plans or accounts, please use our legal name and Federal Tax ID (35-1680796) in lieu of social security number for an organization.

