

## Instructions for Donations through Will or Estate Plans

A bequest is a gift made through your will or living trust. It is usually a set dollar amount, percentage of an estate, or a specific asset that would go to the John W. Brick Foundation after your passing. You can make a bequest by simply including language in a new will or living trust, or by making an amendment to your present will or trust. A bequest is an easy way to support changing the way the world treats mental health in the future without using any of your assets today.

You can arrange for a:

- **Specific bequest** - a certain amount of cash, securities, or property.
- **General bequest** - property that is similar to all other items distributed, usually cash.
- **Percentage bequest** - a stated percentage of the donor's estate.
- **Residual bequest** - all or a portion of what remains of the estate after specific and general bequests are distributed.

You can also set up a trust to benefit charitable organizations during or after their lifetime, such as a [charitable remainder trust](#) or [charitable lead trust](#).

Donors can also name one or more nonprofits as beneficiaries of an [insurance policy](#) or as the recipient of an [IRA](#) or another [qualified retirement fund](#).

### 1. Name the JWB as a Beneficiary

Provide the name John W. Brick Mental Health Foundation and our tax identification number: "I give and devise to the John W. Brick Mental Health Foundation (Tax ID #46-3112634)..."

### 2. Identify what you wish to give to benefit the JWB

The John W. Brick Mental Health Foundation can accept cash, stocks, retirement funds, bank accounts and some forms of real property. If you wish to leave the JWB a specific item or property, please work with us in advance to ensure we can accept your gift.

Select the statement that best fits your needs:

- \_\_\_\_\_ percent of my estate (provide a specific percentage)
- the sum of \$\_\_\_\_\_ (provide specific dollar amount)
- my \_\_\_\_\_ (list a specific asset)
- the remainder of my estate



### 3. Include what you would like your gift to accomplish

If you wish to leave your gift for a specific purpose, please consult with Executive Director, Dr. Cassandra Vieten ([cassandra.vieten@johnwbrickfoundation.org](mailto:cassandra.vieten@johnwbrickfoundation.org)) prior to finalizing your documents to complete a Gift Agreement that ensures your gift can be used as intended.

- *...to be used for its general support.*
- *...to be used for the support of (a specific fund or program).*

### Contingent Gift Language

The John W. Brick Mental Health Foundation can be named as a contingent beneficiary in your will or living trust if one of 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 the John W. Brick Foundation (Tax ID #46-3112634), the sum of \$\_\_\_\_\_ (or all, or a percentage, or 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

Naming the JWB as the beneficiary of a qualified retirement plan asset such as 401(k), 403(b), IRA, Keogh or profit-sharing pension plan allows your hard-earned savings to avoid taxes and be put to their fullest use to benefit the mission of the JWB and is easy to do.

1. *Simply request a change-of-beneficiary form from your plan administrator.*
2. *List JWB as a non-profit organization beneficiary using the Tax ID #46-3112634.*
3. *When complete, please return the form to your plan administrator and notify the JWB Foundation.*

