



FINANCIAL WOMEN'S ASSOCIATION

1956 Circle™

FWA Planned Giving

THE 1956 CIRCLE™ is named for the eight enterprising women on Wall Street who met to share their professional experiences and further their knowledge.

THE 1956 CIRCLE™ recognizes and honors the generosity of donors who have made a commitment to include the FWA in their estate planning, through a planned gift or by making provision for the FWA in their estate plan. We hope you will consider supporting the FWA by including the FWA in your estate plans and becoming a member of the 1956 Circle.

Ways to Give

BENEFICIARY DESIGNATION

An easy way to include the FWA in your estate plan is to name the FWA as beneficiary of your

- Donor Advised Fund
- Retirement Plan
- IRA or other retirement assets
- Life insurance policy
- Bank or brokerage account
- Charitable Lead Trust
- Charitable Remainder Trust

BEQUESTS

You may provide a legacy for the FWA in your Will or a Codicil to your Will or your Trust by stating the FWA is to receive:

- A specific dollar amount
- Specified assets, such as securities
- all or a percentage of your residuary estate (the balance of what is left after all other gifts and obligations).

Any bequest to the FWA is fully deductible for estate tax purposes.

How to Make a Bequest: Useful language

Cash Bequest

"I give, devise and bequeath (the sum of ____dollars) to the Financial Women's Association (FWA of New York, Inc.), to be used for its general purposes.

Residuary Bequest

"I give (all or __ percent) of the rest, remainder and residue of my estate (including lapsed legacies and devises) to the Financial Women's Association (FWA of New York, Inc.), to be used for its general purposes."

Contingent Bequest

I give (name of person) (description of property) (or) (the sum of dollars) (or) (all or __ percent of the rest, residue or remainder of my estate) to the Financial Women's Association (FWA of New York, Inc.) to be used for its general purposes.

Note that if you want to support a particular purpose such as scholarships, financial literacy or microfinance, this can be specified in any of the bequest provisions.

We would be pleased to acknowledge your generosity. We would appreciate your completing and returning the following form. If you choose to be anonymous we will respect that, but would like you to send in the form for our future planning.

This information is not intended to represent legal or tax advice or to substitute for such advice. We urge you to consult your professional advisors when considering your charitable gift planning options.



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Planned Giving Form

Yes, I accept the invitation to join The 1956 Circle™. I have included FWA in my estate plans.

You may include my name in The 1956 Circle
Please list me as: _____

Please count me as an anonymous member.

(Optional) I have provided for the FWA in my:

Will/Living trust

Retirement fund

Life insurance policy

Charitable trust

Other: _____

Date ____/____/____

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____