AFP
Association of Fundraising Professionals Western North Carolina Chapter

Gift Planning Beyond Bequests: ~~Three~~ Four Big Opportunities

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October 19, 2022

#1
Beneficiary designations

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personal.fidelity.com/accounts/services/content/irabene2.shtml

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Beneficiary Designation Forms

Manage beneficiaries online

You can establish or update the beneficiaries on your Fidelity retirement or brokerage (non-retirement) accounts online.

- Update your beneficiaries online
- Update your annuity beneficiaries online

Beneficiary update forms

Establish or update the beneficiary on your Fidelity retirement accounts, brokerage non-retirement accounts, or annuities using the forms below1. The beneficiaries you designate will receive payment of the value of your account(s) following your death.

- Retirement Accounts
- Non-Retirement Accounts
- College Investing Plan Accounts
- Annuities
- Health Savings Accounts (HSAs)

Retirement Accounts

Generally, any beneficiary designation change to a retirement account for which Fidelity Management Trust Company (or successor) acts as custodian will apply to that account only.

- Fidelity IRA/HSA Beneficiary Designation form (PDF)
- Fidelity Retirement Plan (Self-Employed 401(k)/Keogh) Designation form (PDF)

Top

Non-Retirement Accounts

To designate beneficiaries on a Fidelity account registered as Individual, Joint Tenants with Rights of Survivorship, and Tenants by Entirety, use the:

- Fidelity Designated Beneficiary Form and Agreement (PDF)

IRA

IRA DESIGNATION OF BENEFICIARY

The term IRA will be used below to mean Traditional IRA, Roth IRA and SIMPLE IRA, unless otherwise specifie

IRA HOLDER'S NAME AND ADDRESS	IRA TRUSTEE'S OR CUSTODIAN'S NAME A

Social Security Number	Date of Birth	Home Phone	IRA Account Identification	Type of IRA
				☐ Traditional IRA ☐ Roth IRA ☐ SIMPLE IRA

DESIGNATION OF BENEFICIARY(ies)

Please check one of the following options.

☐ **REPLACE BENEFICIARY(IES)** - I designate the individual(s) or entity named below as my primary and/or contingent beneficiary(ies) of all prior beneficiary(ies) designations, if any, made by me.

☐ **ADD BENEFICIARY(IES)** - I designate the individual(s) or entity named below as my primary and/or contingent beneficiary(ies) of this IR but does not replace, the beneficiary(ies) previously designated by me on the date specified. *(When adding beneficiaries, if the share % of pr beneficiary(ies) changes, restate all beneficiaries and the corresponding share % if the previous percentages are no longer correct.)*

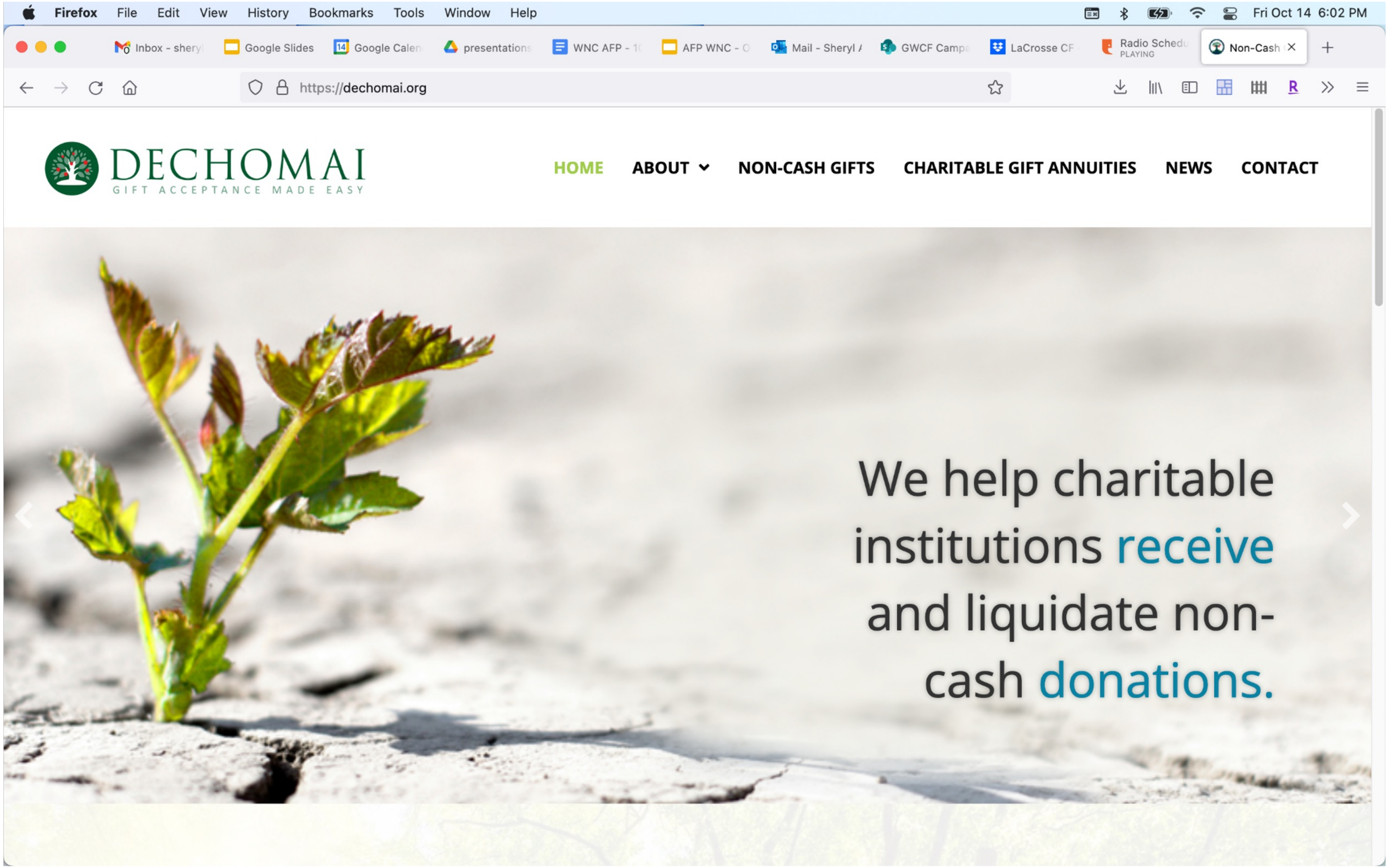
(Document beneficiary(ies) are listed on)

If neither primary nor contingent is indicated, the individual or entity will be deemed to be a primary beneficiary. If any primary or contin me, his or her interest and the interest of his or her heirs shall terminate completely, and the percentage share of any remaining beneficiary(ies) sh basis. If more than one primary beneficiary is designated and no distribution percentages are indicated, the beneficiaries will be deemed to own e IRA. Multiple contingent beneficiaries with no share percentage indicated will also be deemed to share equally. If no primary beneficiary(ies) su beneficiary(ies) shall acquire the designated share of my IRA.

No.	Name and Address	Date of Birth	Social Security	Relationship

#2
Non-cash assets

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We help charitable institutions receive and liquidate non-cash donations.

#3
Donor advised funds

FIGURE 3: Total Assets in Donor-Advised Funds ($B)

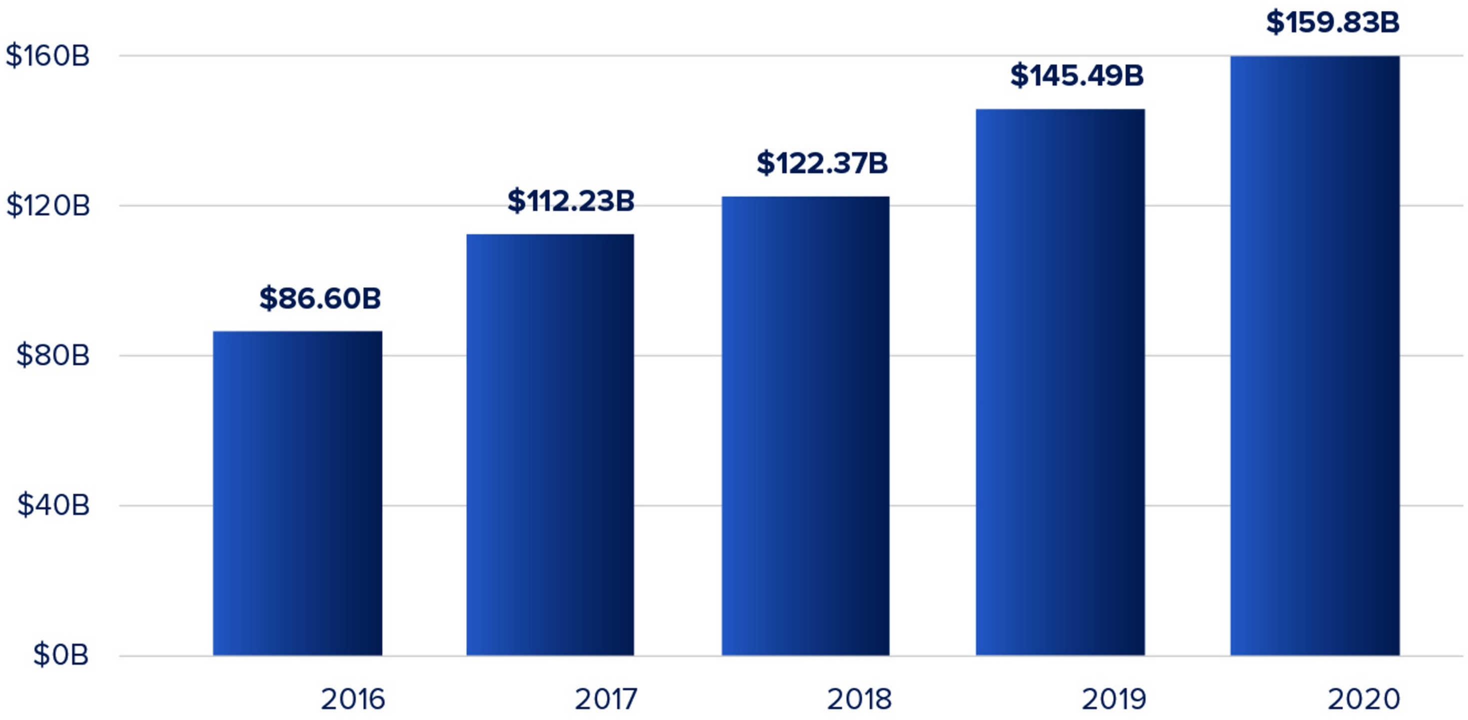
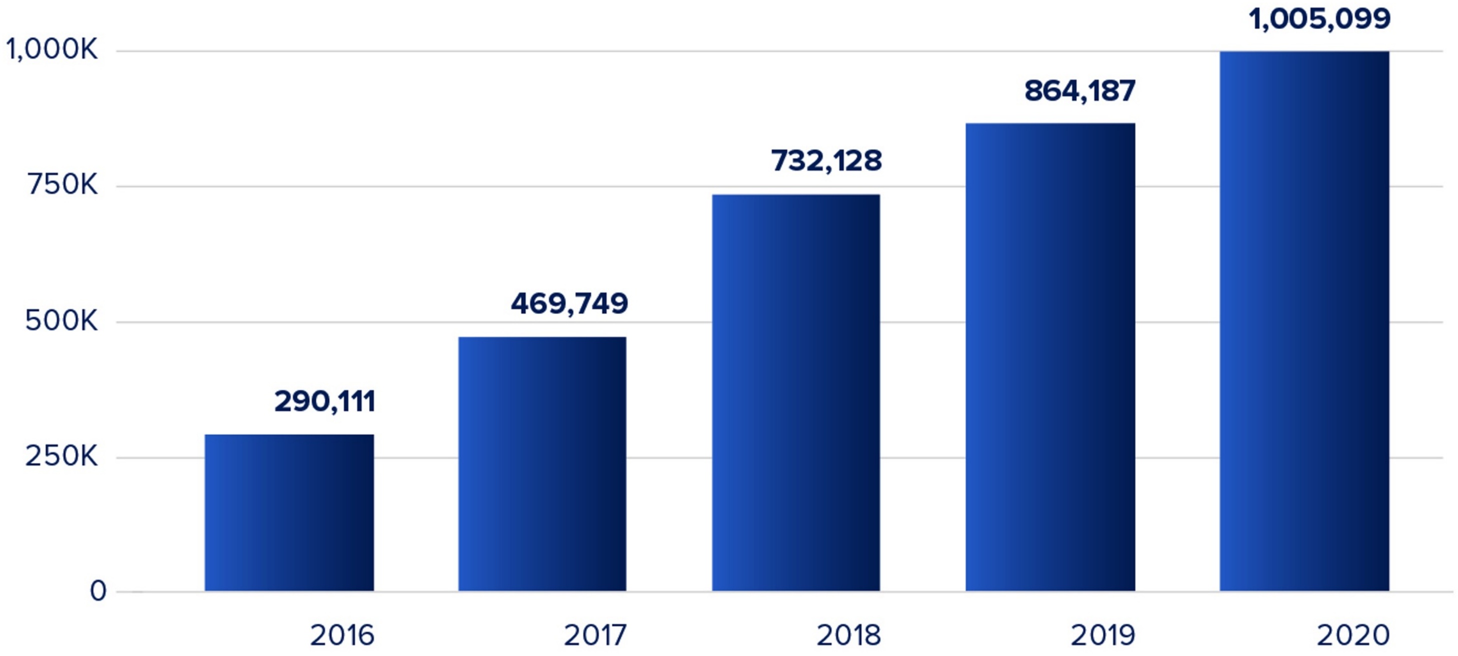


FIGURE 4: Total Number of Donor-Advised Fund Accounts



Donor advised fund

Then what?

#4

Charitable Gift Annuities

A gift that pays income for life

Charitable gift annuity

Donor makes a gift.

Receives a tax deduction and guaranteed income payments for life.

The gift is invested and managed.

After the donor's lifetime, the charity receives the amount that remains.

https://nationalgiftannuity.org/home

NATIONAL GIFT
Annuity Foundation

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https://nationalgiftannuity.org/home

Questions?

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Alenda Consulting

Philanthropic and Charitable Gift Counsel

~ Expert guide for individuals and families navigating questions about donor advised funds, family philanthropy, and legacy planning.

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~ Targeted support for nonprofits seeking to establish, amplify or enhance their planned giving program.

~ Leadership for community foundations to grow asset development, gift planning, endowed giving, donor relations, advisor outreach and nonprofit fund relationships.

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