



**INCLUDING WILDER IN YOUR ESTATE PLAN**

Bequests and other testamentary gifts by generous individuals have been a significant source of financial support for the Amherst H. Wilder Foundation for more than 100 years. The continuation and expansion of this tradition will contribute to Wilder’s future financial strength and positive impact on the lives of those it serves.

A gift to Wilder through your estate plan welcomes you as a Heritage Partner, a member of a committed group of donors whose foresight is shaping the future of our community.

You can make a specific gift to Wilder of cash, securities, real estate, or other property through your will, codicil, or trust instrument. You can also designate Wilder as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, or following the death of your spouse or other primary beneficiaries. Another way to include us in your estate plan is to name Wilder as a full or partial beneficiary of your retirement accounts or life insurance policies.

A bequest or trust provision for the benefit of Wilder may qualify your estate for an estate tax charitable deduction. Please consult with your attorney or financial advisor about your planned gift intentions.

**SAMPLE UNRESTRICTED BEQUEST LANGUAGE:**

*I give the Amherst H. Wilder Foundation, currently located at 451 Lexington Parkway North, Saint Paul, Minnesota 55104, with Federal Tax ID # 41-0693889, (\_\_\_\_\_ % of the residue of my estate) or (the sum of \$ \_\_\_\_\_), to be used by the Amherst H. Wilder Foundation wherever the needs and opportunities are greatest.*

While unrestricted gifts allow Wilder to allocate funds to areas of greatest need, Wilder may agree to accept a bequest designated for a special purpose. In order to ensure the evolving needs of the people Wilder serves are met, Wilder requests that the following language be included in any gift instrument involving a restricted gift:

*In the event that at some future time due to changed circumstances, or in the judgment of the Amherst H. Wilder Foundation’s Board of Directors, it becomes impractical to apply my bequest to the designated purpose(s), the Amherst H. Wilder Foundation is directed to modify the restriction with respect to my bequest, so as to serve a purpose as near as possible to my intended restriction, but to also be of use to Wilder.*

The Amherst H. Wilder Foundation is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code, with tax ID #41-0693889. Contributions are deductible as allowed by law. For more detailed information on including Wilder in your estate plan, please contact:

Amherst H. Wilder Foundation	Michelle Morehouse, VP of Advancement
451 Lexington Parkway North	Phone 651-280-2447
St. Paul, MN 55104	Michelle.Morehouse@wilder.org



**DOCUMENTING YOUR BEQUEST INTENTION**

*To confidentially document your bequest intention, please complete the Bequest Intention Form. Completion of this form is not legally binding, but notification of intent. All information will be kept in the strictest confidence and used for internal planning only.*

In order to support the mission of the Amherst H. Wilder Foundation, I / we have included a non-contingent bequest to Wilder as part of my / our estate plan. If I / we make any change to this provision, I /we will notify Wilder of such a change.

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Birthdate(s)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Home Phone

\_\_\_\_\_  
Mobile Phone

\_\_\_\_\_  
Email Address

Please indicate your type(s) of planned gift below:

- \_\_\_\_\_ Bequest in my/our will (*percent or dollar amount*)
- \_\_\_\_\_ Trust (*percent or dollar amount*)
- \_\_\_\_\_ Retirement Plan Beneficiary
- \_\_\_\_\_ Life Insurance Beneficiary
- \_\_\_\_\_ Charitable Gift Annuity
- \_\_\_\_\_ Family Foundation or Donor Advised Fund Beneficiary

\_\_\_\_\_  
*Name of current financial manager*  
\_\_\_\_\_ Other (real estate, land, business, securities)

Current Estimated Value of Bequest: \_\_\_\_\_

Please add any details you wish to share about your gift intention:

\_\_\_\_\_

\_\_\_\_\_  
Name and phone number of attorney or financial advisor (optional):  
\_\_\_\_\_



## HERITAGE PARTNER SOCIETY

The Wilder Foundation's Heritage Partner Society honors those whom have made a planned charitable gift to Wilder. Recognition includes invitations to special events and inclusion in our Annual Report. Please note your name(s) exactly as you wish them to appear, or note if you prefer to make your planned gift anonymously.

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Name

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Name

\_\_\_\_\_ I / we prefer to make this planned gift anonymously.

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Signature

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Date

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Signature

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Date

Please submit this form to:

Amherst H. Wilder Foundation	Michelle Morehouse, VP of Advancement
451 Lexington Parkway North	Phone 651-280-2447
St. Paul, MN 55104	Michelle.Morehouse@wilder.org