



## *Legacy Planned Giving*

Planned giving is one great way to bequest monies to FOCUS Ministries and make an eternal legacy investment in the lives of the incarcerated and their families in East Tennessee. Below are a few items to consider as you plan your gift.

### **Sample Gift Language for your Will or Revocable Living Trust**

A gift to FOCUS Ministries (PPS & Focus Group Ministries, Inc.) in your will or revocable trust enables you to support our mission and make a difference in the lives of future generations. A bequest:

- is easy to arrange.
- will not alter your current lifestyle in any way.
- can be easily modified to address your changing needs.

### **Residual Gift Language**

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to PPS & Focus Group Ministries Inc., (Tax ID #62-1686129), located in Knoxville, TN, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

### **Specific Gift Language**

Naming PPS & Focus Group Ministries Inc. as a beneficiary of a specific amount from your estate is easy:

*I give and devise to PPS & Focus Group Ministries Inc., Inc. (Tax ID #62-1686129), located in Knoxville, TN, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

### **Contingent Gift Language**

PPS & Focus Group Ministries Inc. or its affiliates can be named as a contingent beneficiary of your will or personal trust if one or 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 PPS & Focus Group Ministries Inc., Inc. (Tax ID #62-1686129), located in Knoxville, TN, the sum of \$ \_\_\_\_\_ (or all or a percentage of 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**

You may name PPS & Focus Group Ministries Inc. (Tax ID #62-1686129) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming PPS & Focus Group Ministries Inc. as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming PPS & Focus Group Ministries Inc. as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death, the plan passes to support PPS & Focus Group Ministries Inc. free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify PPS & Focus Group Ministries Inc. We can also assist you with the proper language for your beneficiary designation to PPS & Focus Group Ministries.

### **Customized Language**

If you or your attorney would like PPS & Focus Group Ministries Inc. to provide you with customized beneficiary language specific to your goals or interests, please contact FOCUS.

### **FOCUS Ministries**

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Phone: 1.888.814.FOCUS / 865.694.3837

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[focustn.org](http://focustn.org) / [office@focustn.org](mailto:office@focustn.org)

*\*\* Samples and language source: Catholic Charities of Los Angeles, Inc.*

**SAMPLE CODICIL**

[date]

I, [name], a resident of the County of [county], State of [state], declare that this is the codicil to my last will and testament, which is dated [date original signed].

I add or change said last will in the following manner:

[List all specific changes or additions to the original will. Reference each section number of the will and the specific language you will be affecting. This is where you could include a bequest to support our mission. See our suggested bequest language that can assist you.]

Otherwise, I hereby confirm and republish my will dated [date original signed], in all respects other than those herein mentioned.

I subscribe my name to this codicil this [day, e.g. 1st] day of [month], [year], at [full address where signed], in the presence of [full name of first witness to codicil], [full name of second witness to codicil], and [full name of third witness to codicil], attesting witnesses, who subscribe their names here in my presence.

\_\_\_\_\_  
Maker

**ATTEST**

On the date last above written, [name], known by us to be the person whose signature appears at the end of this codicil, declared to us, [full name of first witness to codicil], [full name of second witness to codicil], and [full name of third witness to codicil], the undersigned, that the foregoing instrument, consisting of [number of pages to codicil] page(s) was the codicil to the will dated [date original signed]; who then signed the codicil in our presence, and now in the presence of each other, we now sign our names as witnesses.

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Witness

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Witness

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**Disclaimer**

Please have your will or codicil drafted by an attorney who is familiar with the estate laws of the state where you live. We are not engaged in legal or tax advisory service.