

# RETIREMENT DONATIONS



## SAMPLE LANGUAGE FOR YOUR LEGACY GIFT

INHP welcomes the use of the following sample language as you prepare your retirement donation. If you have additional questions, contact Vivien Carter at 317-610-4647 or [vcarter@INHP.org](mailto:vcarter@INHP.org).

### LEGACY GIFT LANGUAGE

I give to the Indianapolis Neighborhood Housing Partnership, a not-for-profit corporation organized under the laws of the state of Indiana and located in Indianapolis, Indiana, *(choose one)*

- \_\_\_% of my gross probate estate; or
- the sum of \$\_\_\_\_\_; or
- all my right, title, and interest in the following described property: \_\_\_\_\_; or
- all the rest, residue, and remainder of my estate.

### ADDING INHP AS A BENEFICIARY

The foregoing notwithstanding, such bequest shall be reduced by the amount, if any, of any Retirement Benefit attributable to me and payable to Indianapolis Neighborhood Housing Partnership as beneficiary. For purposes of this Will, the term "Retirement Benefit" means any benefit or amount that, subsequent to my death, is owned by or payable to Indianapolis Neighborhood Housing Partnership under: an individual retirement account ("IRA") as defined in Section 408; a Roth IRA as defined in Section 408A; a "deemed" IRA or Roth IRA under Section 408(q); and annuity or mutual fund custodial account under Section 403(b); a pension, profit sharing, stock bonus or other retirement plan that is qualified under Section 401(a); any retirement plan or arrangement that is subject to the "minimum distribution rules" of Section 401(a)(9), or equivalent rules under any other Code section; any annuity; similar tax-deferred retirement arrangement or annuity or any plan or arrangement of deferred compensation for services. In order to qualify for any benefit hereunder, such beneficiary shall fully cooperate with my personal representative in providing any requested information concerning the receipt of any Retirement Benefit attributable to me, and shall agree to apply such Retirement Benefit in accordance with any written deferred gift agreement(s) in effect at the time of my death. In the event Indianapolis Neighborhood Housing Partnership is for any reason not in existence or is not a Qualified Charity at the time of my death, such bequest shall lapse.

### SUPPORTING INHP WITH OTHER RETIREMENT ASSETS

Your custodian can initiate a distribution with check payable to INHP and mailed to 2960 N. Meridian St., Suite 300, Indianapolis, IN 46208. Once a distribution has been initiated, contact Vivien Carter at INHP.

