

Remember the Group Foundation for Advancing Mental Health in Your Last Will and Testament

Today, all across America, loyal and dedicated volunteers help ensure the future of the organizations they serve by making a bequest. A bequest is a personal decision, a statement incorporated into your will that you wish to have a certain portion of your assets given to the Group Foundation for Advancing Mental Health in your name. Properly constructed, a bequest can represent a considerable estate tax savings for your heirs. There are a few varieties, which we ask that you consider.

Fixed-Sum Bequest: *A certain number of dollars, or shares of stock, or a parcel of real property is to be transferred. The bequest in your will might read:*

I give the sum of \$ _____ to the Group Foundation for Advancing Mental Health, a nonprofit corporation organized under the laws of the State of New York, with a principal business address of 25 East 21st Street, 6th Floor, New York, NY, 10010, or its successor(s) in interest.

Fixed-Percentage Bequest: *Sometimes, we are reluctant to name a specific dollar amount for a planned gift because we do not know what our family will need or what our resources might be in years to come. This type of bequest would state:*

I give _____% of my gross estate to the Group Foundation for Advancing Mental Health, a nonprofit corporation organized under the laws of the State of New York, with a principal business address of 25 East 21st Street, 6th Floor, New York, NY, 10010, or its successor(s) in interest.

Residual Bequests: *Sometimes we want to make specific provisions for individuals but then leave the remainder of our estate to charity. After naming the specific individuals and the amounts they are to receive, a residual bequest would read:*

I give all the rest, residue and remainder of my estate to the Group Foundation for Advancing Mental Health, a nonprofit corporation organized under the laws of the State of New York, with a principal business address of 25 East 21st Street, 6th Floor, New York, NY, 10010, or its successor(s) in interest.

Event-Triggered Bequests: *Even with the best estate plan, you may find yourself in an unanticipated situation in which your named beneficiary might predecease you. It is possible to create a contingent bequest in which you would state:*

If _____ (the named beneficiary) does not survive me, I give such share to the Group Foundation for Advancing Mental Health, a nonprofit corporation organized under the laws of the State of New York, with a principal business address of 25 East 21st Street, 6th Floor, New York, NY, 10010, or its successor(s) in interest.



Making a planned gift to the Group Foundation for Advancing Mental Health can be an important part of your estate strategy. Whether you have other planned gifts in place or are just becoming familiar with the options available to you, it is essential that you consult both your attorney and financial advisor to ensure that the choices you make are right for you. Writing your will, planning for the beneficiaries you want, retains your right to remember family, cherished friends, and a favorite charity.

The Group Foundation for Advancing Mental Health is designated by the Internal Revenue Service as a 501(c)(3) non-profit charitable organization to which tax deductible contributions may be made.