



## Sample Gift Language for Your Will or Revocable Living Trust

*A legacy, or planned, gift is a way for you to support the Society that not only enables you to support of the mission for years to come, but also to make a larger gift than you could make from ordinary income.*

Naming the Society of St. Vincent de Paul Archdiocese of Galveston-Houston in your will or revocable trust empowers you to support our mission and make a difference in the lives of future generations. A planned gift is:

- 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 the Society of St. Vincent De Paul Archdiocese of Galveston-Houston (EIN 74-1464210), located in Houston, TX, 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 the Society of St. Vincent De Paul Archdiocese of Galveston-Houston as a beneficiary of a specific amount from your estate is easy:

*I give and devise to the Society of St. Vincent De Paul Archdiocese of Galveston-Houston (EIN 74-1464210), located in Houston, TX, 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

The Society of St. Vincent De Paul Archdiocese of Galveston-Houston or its affiliates can be named as a contingent beneficiary in 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 the Society of St. Vincent De Paul Archdiocese of Galveston-Houston (EIN 74-1464210), located in Houston, TX, 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 the Society of St. Vincent De Paul Archdiocese of Galveston-Houston 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 the Society of St. Vincent de Paul Archdiocese of Galveston-Houston 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 the Society of St. Vincent de Paul Archdiocese of Galveston-Houston 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 the agency 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 the Development Office at:

Society of St. Vincent De Paul Archdiocese of Galveston-Houston  
Attn: Development Office  
2403 Holcombe Blvd  
Houston, TX 77021

We can also assist you with the proper language for your beneficiary designation.

### Customized Language

If you or your attorney would like us to provide you with customized beneficiary language that is specific to your goal and interest, please contact the Development Department at [development@svdphouston.org](mailto:development@svdphouston.org) or 832-538-0325.