Advisors Guide for Planned Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name ADI in your will or trust please use the following suggested language:

Residual Bequest Language

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

I give and devise to ADI (EIN 30-0456686) 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 Bequest Language

You can also name ADI as a beneficiary of a specific amount from your estate:

I give and devise to ADI (EIN 30-0456686) the sum of $ _____ (or "____ shares of _____ stock") to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language

ADI 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 individual heir's name) is not living at the time of my demise, I give and devise ADI (EIN 30-0456686) the sum of $ (or "all" or " _____ percentage of the residue of my estate") to be used for its general support (or for the support of a specific fund or program).

Gifts Of Appreciated Securities:

Beneficiary gifts from retirement plans, life insurance, brokerage accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Elie Klein ♦ Director of Development, USA & Canada ♦ eliek@adi-israel.org

Legal Name: ADI ISRAEL FOUNDATION, INC.
Tax ID Number: 30-0456686
Adress: 1416 E 7th St
Brooklyn, NY 11230-5711

Note to attorneys, accountants and other professional advisors:

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason, we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into well-crafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based on information we provide.

If you have any questions or concerns, please call (516) 589-8790 or email eliek@adi-israel.org

Disclosure: This information is not intended as legal advice. For more specific advice, please consult your attorney or financial adviser.

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