



Wills, Bequests and Beneficiary Designations

A bequest is one of the most meaningful legacies you can create. Making a bequest through a will or a living trust makes a statement about what matters most in your life and ensures that your intentions will be followed by those administering your estate. You may designate a specific dollar amount, a percentage of the remaining estate, or make a beneficiary designation of certain assets to A Place To Be.

To include us as a beneficiary in your Will or Living Trust, you'll need to work with your estate planning attorney to modify your documents accordingly. To include a bequest to A Place To Be in your will, we suggest this simple statement:

"I give, devise and bequeath to A Place To Be, a nonprofit organization located at PO Box 1472, Middleburg, VA 20118, tax ID 45-3081114, ____% of the remainder and residuary of my estate [or \$ ____ if a specific amount, or otherwise describe the gift] to be used for the general purposes of A Place To Be at the discretion of the Executive Director."

If you want to designate A Place To Be as a beneficiary in Virginia, the specific documentation you need will depend on the type of asset you want to designate. For Retirement Accounts (IRA, 401(k)) you will need the beneficiary designation form provided by the financial institution that holds your account. For Life Insurance, you will need the change-of-beneficiary form provided by your life insurance provider. For the Virginia Retirement System (VRS), log in to your account to access beneficiary designation forms. For all of the above, be sure you use our legal name, A Place To Be, and tax ID number (EIN) 45-3081114.

Please note that the information above is of a general nature and is not intended as legal advice. It should not replace the counsel of tax, legal or estate planning advisors.

Contact and Questions:

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