



ADVISOR'S 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 The New England Hemophilia Association 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 The New England Hemophilia Association (Tax ID #: 04-6111861), located in Dedham, MA 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

Naming The New England Hemophilia Association as a beneficiary of a specific amount from your estate is easy.

I give and devise to The New England Hemophilia Association (Tax ID #: 04-6111861), located in Dedham, MA, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language

The New England Hemophilia Association 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 New England Hemophilia Association (Tax ID #: 04-6111861), located in Dedham, MA, 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).

Gifts of Appreciated Securities

Please contact us directly for a stock transfer form by emailing info@nehemophilia.org

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 info@nehemophilia.org

Legal Name: **The New England Hemophilia Association**

Tax ID Number: **04-6111861**

Incorporated In: **Dedham, MA**

Note to Attorneys, Accountants and Other Professional Advisors

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact info@nehemophilia.org

Proudly supporting the New England bleeding disorders community since 1957.