



## INCLUDE US IN YOUR ESTATE PLANNING

Including Compass Center for Women and Families (Compass Center) in your final giving plans allows you to enjoy the benefits of a gift to charity while making a powerful statement about your concern for the safety, security and self-sufficiency of our community members in need. Remembering Compass Center in your Will or Trust, or in your other charitable giving plans, allows us to help thousands of people through our self-sufficiency, domestic violence and empowerment services. The *Legacy Circle* is our special way of recognizing those whose planned gifts help to ensure a healthy financial future for our organization and greater security for the people we serve.

## HOW CAN I JOIN THE LEGACY CIRCLE?

There are many tax-advantageous ways to benefit Compass Center in your estate plan. Here are two suggestions:

- Name Compass Center as a beneficiary in a Will or Living Trust
- Name Compass Center as the beneficiary of a paid life insurance policy or a retirement account

To include Compass Center in your plans, you may need the following information:

<b>Legal Name:</b>	<b>The Women's Center, Inc., DBA Compass Center for Women and Families</b>
<b>Legal Address:</b>	<b>P.O. Box 1057, Chapel Hill, NC 27514-1017</b>
<b>Federal Tax ID:</b>	<b>56-1271474</b>
<b>Organization Status:</b>	<b>501(c)(3) nonprofit</b>

Sample Bequest Language:

*I hereby give, devise and bequeath [the sum of \$\_\_\_\_\_/\_\_\_\_\_% of my residuary estate/my entire residuary estate] to Compass Center for Women and Families, located in Chapel Hill, North Carolina, Tax ID number 56-1271474, to be used [for its general charitable purposes/\_\_\_\_\_ (restricted fund/specific program/etc.)].*

We hope you will consider becoming a member of our *Legacy Circle*. In doing so, we will be honored to acknowledge your contribution by including your name on our *Legacy Circle* list, unless you wish that your gift remain anonymous. Additionally, you will be invited to our annual donor recognition events.

Please complete the attached **Statement of Testamentary Provision** document and provide as much or as little of the information as you feel comfortable, and return it to Compass Center at the address above. While this form is not required or legally binding, it helps us to plan and understand how you prefer we recognize your gift.

*For more information on your estate planning options, please consult your financial, tax and/or legal advisors to determine the benefits of making a gift.*

*For general questions please contact Compass Center at 919-968-4610 ext. 301*



STATEMENT OF TESTAMENTARY PROVISION

\_\_\_\_\_  
Name (please print name as you would have it published)

As a *Legacy Circle* member, your name(s) will be listed in our newsletter and annual report, as well as on our donor list (unless you request no listing).

\_\_\_1.) Do publish in donor recognition publications, with the hope that we may inspire others to give;

\_\_\_2.) Do not publish. I/We choose to be anonymous *Legacy Circle* member(s).

For good recordkeeping and to help with our future budget processes, please indicate the type of support you have made in your estate plan for Compass Center.

DESCRIPTION:

General description of type of provision: (will, revocable trust, retirement account, other – please describe):

\_\_\_\_\_

Definition of provision (percentage of total estate, specific dollar amount, etc.):

\_\_\_\_\_

I/We understand that the following is for planning purposes only and that values are subject to change.

I/We anticipate our future gift to Compass Center to be valued at approximately: \$\_\_\_\_\_

PURPOSE:

\_\_\_1) The gift is unrestricted and may be used where the need is greatest at the time.

\_\_\_2) The gift is to be used for the following purpose: \_\_\_\_\_

SIGNATURES:

\_\_\_\_\_ Date: \_\_\_\_\_ Birth Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E---mail: \_\_\_\_\_

**THANK YOU!**

**PLEASE return this form to:**

**Compass Center for Women and Families, PO Box 1057, Chapel Hill, NC 27514-1017**

**Or by Fax at 919-932-3125**

*Please consult your financial, tax and/or legal advisors to determine the benefits of making a gift.*

*For general questions, please contact Compass Center at 919 968-4610 x 301*