

Westmark School

THE DIFFERENCE IS BRILLIANT

PLANNED GIVING GUIDE

You can name Westmark School in your long-range plans, including:

- Your will or trust, using wording such as: "I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID # 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, the sum of \$_____; or _____% of the residue of my estate."
- IRA or retirement plan
- Life insurance policy
- Financial account
- Charitable IRA distribution: If you are age 70-1/2 or older, you may be eligible to transfer up to \$100,000 in gifts directly from your IRA to Westmark School and exclude the amount of your gift from taxable income.

SUGGESTIONS FOR BEQUEST VERBIAGE

You may include a bequest to support Westmark School when preparing your will or living trust, or by adding a codicil to your present will or living trust. Bequests may be of cash, securities, bonds, real estate, copyrights, royalties, or other property. Bequests of all sizes are welcome, whether they are outright, residual, or contingent.

The following information is not intended to be legal or tax advice. We recommend that you consult with a qualified estate planning attorney when drafting your will or living trust. These are suggestions only to be of assistance to you or your attorney when filling out the Westmark School Planned Giving Notification form:

SPECIFIC BEQUEST:

"I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID # 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, the sum of \$_____; or _____% of my estate for general support purposes."

RESIDUAL BEQUEST:

"I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-

profit organization (Federal Tax ID # 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, ____% of the residue of my estate for general support purposes."

CONTINGENT BEQUEST:

"In the event that _____ predeceases me, I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID# 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, _____% of the residue of my estate for general support purposes."

SAMPLE LETTER

Sample letter from IRA account owner to IRA administrator requesting a Charitable Distribution be made from an Individual Retirement Account:

(Date)

(IRA Administrator Name)

(Street Address)

(City, State and Zip Code)

RE: Request for Charitable Distribution from Individual Retirement Account (IRA)

Dear (IRA Administrator Name),

I am requesting a direct charitable distribution from my Individual Retirement Account # _____ as provided by The Protecting Americans from Tax Hikes Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____ payable to Westmark School and mail to the following address:

Westmark School
Advancement Office
5461 Louise Avenue
Encino, CA 91316

Send the check directly to Westmark School at the above address. Please include my name on the check or with accompanying correspondence, and send me a copy of the transfer for my records. Questions for Westmark School should be directed to the Advancement Office at advancement@westmarkschool.org or 818-986-5045. The

Federal Tax ID number of Westmark School (aka Learning With A Difference, Inc.) is 95-4616645.

You may contact me at () _____ - _____ if you have any questions. Thank you for your assistance.

(Your Signature)

(Your Printed Name)

(Your Street Address)

(Your City/State/Zip)