

Make a Planned Gift

Goodwill Industries of Southeastern Wisconsin is a nonprofit 501(c)(3) organization (EIN/tax ID number: 39-0808491). Your gifts are fully tax-deductible to the extent allowable by law.

Planned gift options include:

- Naming Goodwill Industries of Southeastern Wisconsin in your will.
- Giving Goodwill Industries of Southeastern Wisconsin an insurance gift.
- Declaring Goodwill Industries of Southeastern Wisconsin as a beneficiary of a 401(k), 403(b) or IRA plan.
- Create a Charitable Remainder Trust.

You can also make a gift directly to Goodwill through one of two methods:

- **Over the phone** by calling (414) 847-4172.
- **By mail** at Goodwill Industries of Southeastern Wisconsin, 5400 S. 60th Street, P.O. Box 509, Greendale, WI 53129-0509.

Questions about planned giving can be sent to Catherine Girard, Vice President of Development and Community Services at 414-847-4172.

Name Goodwill in Your Will

To make an estate gift to Goodwill, request your attorney to draft a statement in a will that conveys your desire to contribute in one of the following ways. Sample language is provided below.

Give the Entire Residue of Your Estate

"All the residue of my estate, including real and personal property, I give, devise, and bequeath to Goodwill Industries of Southeastern Wisconsin, located in Milwaukee, Wisconsin, a nonprofit nonstock organization as described in section 501c(3) of the internal revenue code."

Give a Percentage of Your Estate

"I hereby give, devise, and bequeath to Goodwill Industries of Southeastern Wisconsin, located in Milwaukee, Wisconsin, a nonprofit nonstock organization as described in section 501c(3) of the internal revenue code _____ percent of my estate."

Give a Specific Amount

"I hereby give, devise, and bequeath to Goodwill Industries of Southeastern Wisconsin, located in Milwaukee, Wisconsin, a nonprofit nonstock organization as described in section 501c(3) of the internal revenue code _____."

Give a Restricted Estate Gift

"I give to Goodwill Industries of Southeastern Wisconsin, Inc., a nonprofit organization, the sum of \$ _____ (or _____ % of my estate OR the property described herein) to be used for (specify purpose). If Goodwill

determines that it is impossible or impractical to use my gift for the stated purpose, then Goodwill may use my gift for its general use and purposes consistent with Goodwill's mission.”

Give Goodwill an Insurance Gift

A life insurance policy is another asset with which you can help Goodwill continue to provide training, employment and supportive services for people with disabilities or disadvantages who seek greater independence.

Name Goodwill as a Beneficiary

To name Goodwill as the beneficiary of the total or a percentage of your life insurance policy:

- **Total Amount:** Name Goodwill Industries of Southeastern Wisconsin presently located at 5400 S. 60th Street, P.O. Box 509, Greendale, WI 53129-0509 the beneficiary of 100% (one hundred percent) of the proceeds of the policy.
- **Percentage Amount:** Name Goodwill Industries of Southeastern Wisconsin presently located at 5400 S. 60th Street, P.O. Box 509, Greendale, WI 53129-0509 as the beneficiary of _____ % (percentage spelled out) of the proceeds of the policy.

Gift the Insurance Policy Today

If the policy is a paid-up policy and there are no loans, liens, or debts against it, consider giving it to Goodwill. Discuss this first with your legal and financial advisors, and then call Catherine Girard, Vice President of Development and Community Services at 414-847-4172.

Name Goodwill as a 401(K), 403(B) or IRA Beneficiary

Qualified employee benefit plans accumulate tax free during your lifetime. At death, they are subject to tax.

- 100 percent of the account balance is included in the taxable estate of the decedent.
- Any taxable beneficiary who receives a distribution from an IRA, 401(k), or 403(b) as a result of the death of the owner must pay income tax on the entire amount received.
- Some plans could be taxed as much as 85% as a result of these taxes.

Goodwill Industries of Southeastern Wisconsin is a qualified 501(c)3 organization, a nonprofit. A gift of plan proceeds exempts them from taxes.

- The beneficiary designation to the qualified charity frees your gift from subjection to estate tax.
- As a nonprofit, Goodwill of Southeastern Wisconsin is not subject to income tax.

To name Goodwill Industries of Southeastern Wisconsin as your qualified plan beneficiary:

- **Total Amount:** Give 100% (one hundred percent) to Goodwill Industries of Southeastern Wisconsin presently located at 5400 S. 60th Street, P.O. Box 509, Greendale, WI 53129-0509.
- **Percentage Beneficiary:** Give _____ % (percentage spelled out) to Goodwill Industries of Southeastern Wisconsin presently located at 5400 S. 60th Street, P.O. Box 509, Greendale, WI 53129-0509.