



**AFFORDABLE LAW FIRM**

## **LEAVE A LEGACY OF ACCESSIBLE JUSTICE BY REMEMBERING DC AFFORDABLE LAW FIRM IN YOUR WILL, TRUST, LIFE INSURANCE POLICY, OR THROUGH AN ANNUITY.**

### **SAMPLE GIFT LANGUAGE FOR YOUR WILL OR REVOCABLE LIVING TRUST**

#### **Residual Gift Language**

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to DC Affordable Law Firm (Tax ID 47-3852711), located in Washington, DC, 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 Gift Language**

Naming DC Affordable Law Firm as a beneficiary of a specific amount from your estate is easy:

I give and devise to DC Affordable Law Firm (Tax ID 47-3852711), located in Washington, DC, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific program).

#### **Contingent Gift Language**

DC Affordable Law Firm 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 DC Affordable Law Firm (Tax ID 47-3852711), located in Washington, DC 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 program).

### **CUSTOMIZED LANGUAGE**

If you or your attorney would like DC Affordable Law Firm to provide you with customized beneficiary language that is specific to your goal and interest, please contact Gabby Mulnick Majewski at 202-844-5421 or [gmajewski@dcaffordablelaw.org](mailto:gmajewski@dcaffordablelaw.org).

### **RETIREMENT PLAN BENEFICIARY**

Naming DC Affordable Law Firm as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh, or profit-sharing pension plan will accomplish a charitable goal while potentially realizing significant tax savings. By naming DC Affordable Law Firm as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death, the plan passes to support DC Affordable Law Firm generally free of estate taxes.

Making a charitable gift from your retirement plan is easy. The first step is to request a change-of-beneficiary form from your plan administrator; spousal consent may be required. When you have finished, please return the form to your plan administrator and notify DC Affordable Law Firm.

**Please consult with your financial advisor to determine which option is best for you.**