

## Testamentary Giving

Naming your donor advised fund in your estate planning documents, insurance policies, and retirement plans is an efficient and flexible way to establish your charitable legacy. Naming a donor advised fund in these documents allows for easy changes later on. You can make changes at any time to the charities that will benefit from your fund (with no fees associated to these changes), rather than amending your legal documents.

### How to Name The Signatry as a Beneficiary

Please use the wording below to name your donor advised fund or Generations Fund\* in your estate planning documents, insurance policies, and retirement plans:

Servant Foundation, d/b/a The Signatry, (a Missouri nonprofit corporation subject to its governing instruments, policies and procedures, as amended from time to time [TIN# 43-1890105]), or its successor in interest, designated for The           [NAME OF FUND]           Donor Advised Fund, fund #           [FUND NUMBER]          .

If you like, you may provide The Signatry with a copy of legal documents, or you may send a letter notifying us that you have included your donor advised fund in the legal documents.

Upon your passing, The Signatry will be notified, and the proceeds will be transferred to your fund. We will then carry out your requested wishes according to the instructions you provided us. If legal fees are incurred during the settlement and distribution, The Signatry reserves the right to cover actual expenses from the proceeds.

*\*If you would like The Signatry to take on greater responsibility for carrying out your wishes than what a regular succession plan entails, you may open a Generations Fund. With a Generations Fund, you can work with our Donor Care team to create a specific plan for carrying on your legacy for future generations. Please contact The Signatry for more information about a Generations Fund.*