



## Leaving A Legacy Through Your Retirement Account

### Your Bequest to HAI Global Can Be Tax-Free

One of the simplest steps that be taken is to designate HAI Global as a beneficiary of whatever funds remain in your retirement investment account(s) at the time of your death. It is easy to do and there are other benefits as well.

When your retirement investments have been made with pre-tax dollars (traditional IRAs, 401K, SEP IRA, etc.) they are taxed when withdrawn by the investor or transferred to heirs. However, as a non-profit organization, HAI Global can receive these funds *tax free*. For this reason, making HAI Global the beneficiary of all or part of your remaining retirement funds may be the optimal way to give for many people

Designating a beneficiary on your retirement accounts is very easy. It does not require an attorney and you do not need a Will to accomplish this. In most cases, you can simply go online or call your financial institution to specify your beneficiaries and the percentage of the account designated to each, and you can change the beneficiary and the percentage at any time.

### Please Let Us Know

Financial institutions are not always required to contact beneficiaries after the account holder dies. To ensure that HAI Global receives your gift, if you designate HAI as a beneficiary, please let us know.

When you have designated HAI Global as a beneficiary on a retirement account, please:

1. Fill out the attached form and send it to the HAI Global office.
2. If you have a Will, state that HAI Global is a beneficiary of your retirement account(s). This will help ensure that the executor of your estate will contact HAI upon your death.

### Thank You

Thank you for being willing to engage in this conversation. Legacy donations are a way to ensure that the work of HAI and the dream of Stan Dale will continue long past our mortal ending. Please consider a bequest to HAI Global.

HAI Global / The Human Awareness Institute  
*"Creating a World of Love and Acceptance"*  
593 North McDowell Blvd., Suite B | Petaluma | CA | 94954  
Non-profit 501(c)(3) organization  
[www1.hai.org](http://www1.hai.org)  
[\(707\) 981-7886](tel:7079817886)  
[norcal-office@hai.org](mailto:norcal-office@hai.org)



## **Informing HAI Global That You Have Made a Bequest**

If you have designated HAI Global as a beneficiary in your retirement account, to help ensure that HAI receives your gift, please fill out this form and send it to the HAI Global office ([norcal-accounting@hai.org](mailto:norcal-accounting@hai.org)).

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

Name: \_\_\_\_\_

Address: \_\_\_\_\_

I have included HAI Global in my estate plans:

- Through my retirement plan
- Through an insurance policy
- In my will
- Through a trust
- Other

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If you are naming HAI Global as a beneficiary for specified accounts in your will or trust, please also complete the Executor information below.

Here is an example of how you can make HAI a beneficiary of your will or trust:

“I, [name], of [city, state, ZIP], give, devise, and bequeath to HAI Global [tax ID number: 26-3847947], a nonprofit organization located at 593 N. McDowell Blvd. Suite B, Petaluma, CA 94954, [dollar amount, or percent of the estate, or description of property] for its unrestricted use.”

Executor of Will or Trustee (name and contact information)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any Comments or Requests:

\_\_\_\_\_  
\_\_\_\_\_

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