

Language to Name Komen Austin as a Beneficiary of Your Will, Trust, Life Insurance Policy, Retirement Assets, or Other Contractual Gift.



A. GIFTS UNDER A WILL

The following language is an example of wording that may be used to name Komen Austin as a beneficiary of your last will and testament. You may either make a general or restricted gift to Komen Austin for education, screening, or treatment support. In addition such gift may be of a specific dollar amount or it may also be of a percentage of your estate.

If you wish to make a restricted gift to Komen Austin, please contact us at the phone number or email address at the bottom of this document prior to finalizing your gift.

a. GENERAL TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: GENERAL TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: I hereby give and bequeath _____ Dollars (\$_____) to Susan G. Komen® Austin, of Austin, TX, to be used for general purposes. In the event Susan G. Komen® Austin is not in existence at the time of my death, then I hereby give and bequeath _____ Dollars (\$_____) to the national headquarters of Susan G. Komen for the Cure, of Dallas, Texas, to be used for general purposes in the former service area of Susan G. Komen® Austin.

b. GENERAL TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: GENERAL TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: I hereby give and bequeath _____ percent (____%) of the rest and residue of my estate to the Susan G. Komen® Austin, of Austin, TX, to be used for general purposes. In the event Susan G. Komen® Austin is not in existence at the time of my death, then I hereby give and bequeath _____ percent (____%) of the rest and residue of my estate to the national headquarters of Susan G. Komen for the Cure, of Dallas, Texas, to be used for general purposes in the former service area of Susan G. Komen® Austin.

c. RESTRICTED TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: RESTRICTED TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: I hereby give and bequeath _____ Dollars (\$_____) to Susan G. Komen® Austin, of Austin, TX, to be used for Austin, TX. In the event Susan G. Komen® Austin is not in existence at the time of my death, then I hereby give and bequeath _____ Dollars (\$_____) to the national headquarters of Susan G. Komen for the Cure, of Dallas, Texas, to be used for [insert donor restriction] in the former service area of Susan G. Komen® Austin.

d. RESTRICTED TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: I hereby give and bequeath _____ percent (____%) of the rest and residue of my estate to Susan G. Komen® Austin, of Austin, TX, to be used for [insert donor restriction]. In the event Susan G. Komen® Austin is not in existence at the time of my death, then I hereby give and bequeath _____ percent (____%) of the rest and residue of my estate to the national headquarters of Susan G. Komen for the Cure, of Dallas, Texas, to be used for [insert donor restriction] in the former service area of Susan G. Komen® Austin.

B. GIFTS FROM A TRUST

The following language is an example of wording that may be used in the event Susan G. Komen® Austin is named as a contingent beneficiary of a trust estate. Please keep in mind that such gifts may also be restricted and may be of either a specific dollar amount or a percentage of the trust estate.

[Insert contingency], the Trustee shall distribute _____ Dollars (\$_____) to Susan G. Komen® Austin of Austin, TX, free and clear of trust, to be used for general purposes. In the event Susan G. Komen® Austin is not in existence at the time of this distribution, the Trustee shall distribute _____ Dollars (\$_____) to the national headquarters of Susan G. Komen®, of Dallas, Texas, free and clear of trust, to be used for general purposes in the former service area of Susan G. Komen® Austin.

C. CONTRACTUAL GIFTS

Susan G. Komen® Austin may be named as the beneficiary of an asset that passes outside the terms of a will or a trust (e.g. life insurance, IRA, 401(k)). In order to clarify the intention of the donor, the contractual instrument governing the asset should set forth the following as the official recipient of the gift:

Susan G. Komen® Austin, of Austin, TX. In the event Susan G. Komen® Austin is not in existence, then to the national headquarters of Susan G. Komen®, of Dallas, Texas, for the benefit of the former service area of Susan G. Komen® Austin.

D. GENERAL INFORMATION

Below please find some general information that may be beneficial to you in finalizing your estate plan.

Legal Name: Austin Affiliate of the Susan G. Komen Breast Cancer Foundation, Inc. d/b/a Austin Affiliate of Susan G. Komen for the Cure

Incorporation Details:

- 501(c)(3) organization, classified as a public charity, exempt from federal income tax
- Delaware non-profit corporation

Mailing Address: P.O. Box 2164, Austin, TX 78768

Libby Tilley
Development Director
Susan G. Komen® Austin
512.473.0900
ltilley@komenaustin.org