**Advisors Guide for Planned Giving**

**Gifts from Wills and Trusts:**

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name The Lehigh Conference of Churches in your will or trust please use the following suggested language:

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

*I give and devise to The Lehigh Conference of Churches of Allentown, Pennsylvania (23-1484205) all (or state 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 Bequest Language**
You can also name The Lehigh Conference of Churches as a beneficiary of a specific amount from your estate:

*I give and devise to The Lehigh Conference of Churches of Allentown, Pennsylvania (23-1484205) the sum of $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (or "\_\_\_\_ shares of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ stock") to be used for its general support (or for the support of a specific fund or program).*

**Contingent Bequest Language**
The Lehigh Conference of Churches 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 individual heir's name) is not living at the time of my demise, I give and devise to The Lehigh Conference of Churches of Allentown, Pennsylvania (23-1484205) the sum of $ (or "all" or " \_\_\_\_\_\_\_\_\_\_\_ percentage of the residue of my estate") to be used for its general support (or for the support of a specific fund or program).*

**GIFTS OF APPRECIATED SECURITIES**

**How to Transfer Securities**

Notify your broker to transfer the specified shares electronically. You will need the following information for your request:

* The Lehigh Conference of Churches DTC number (0062).
* The Lehigh Conference of Churches account number at Vanguard (0502-09948121495) to ensure proper designation to the Conference.
* The name of the stock you would like transferred.
* The number of shares you would like transferred.

It is important to notify our admin office of the specifics of this transaction (stock name, share quantity, gift designation) so we can credit your gift appropriately. Please contact us at 610-433-6421 x6113 or cmoran@lehighchurches.org.

**BENEFICIARY GIFTS FROM RETIREMENT PLANS, LIFE INSURANCE, BROKERAGE ACCOUNTS OR ANY OTHER PLAN WITH A BENEFICIARY DESIGNATION:**

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Christopher Moran, Development Officer, at cmoran@lehighchurches.org

Legal name: The Lehigh Conference of Churches
Tax ID number: 23-1484205
Address: 457 W. Allen Street
Allentown, PA  18102

**NOTE TO ATTORNEYS, ACCOUNTANTS AND OTHER PROFESSIONAL ADVISORS:**

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into well-crafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based on information we provide.

If you have any questions or concerns, please call 610-433-6421 or email cmoran@lehighchurches.org.

**Disclosure:** This information is not intended as legal advice. For more specific advice, please consult your attorney or financial adviser.