



NATIONAL KIDNEY
FOUNDATION®

of Wisconsin

Simple Ways to Make a Planned Gift

Join in the legacy of National Kidney Foundation of Wisconsin with a planned gift to advance kidney health and raise awareness for organ, eye, & tissue donation.

Contact Carolyn Spath at 414-897-8669 x 14 or cspath@kidneywi.org to learn more.

BANK/BROKERAGE ACCOUNT: You can designate the balance of your bank or brokerage account to National Kidney Foundation of Wisconsin, Inc as POD or TOD. Did you know that a POD (Paid On Death) overrides a will? When you designate a charity as a beneficiary of an account, there is no need to update an existing will.

BEQUESTS: One of the easiest planned gifts to make is through a will or trust. As part of your estate plan, you can include special bequest language in your will or trust, specifying a gift to National Kidney Foundation of Wisconsin, Inc. Designating NKF in your will does not affect your current finances and can be adjusted or revoked at any time. You can gift a specific dollar amount, a percentage of your estate or the balance or remainder of your estate.

NOTE: Always consult with a financial advisor or attorney when considering any changes or updates to an existing will or trust.

Below are sample bequest language options to help assist you and your attorney when considering making a bequest to National Kidney Foundation of Wisconsin

I hereby give, devise and bequeath _____ and No/100 dollars (\$_____) to National Kidney Foundation of Wisconsin, Inc., a nonprofit organization located at 10909 W Greenfield Ave, Ste 201, West Allis, WI 53214 (Federal Tax ID #39-1133761), for National Kidney Foundation of Wisconsin's general use and purpose in the State of Wisconsin.

I hereby give, devise and bequeath _____ percent (____%) of my total estate, determined as of the date of my death, to National Kidney Foundation of Wisconsin, Inc., a nonprofit organization located at 10909 W Greenfield Ave, Ste 201, West Allis, WI 53214 (Federal Tax ID #39-1133761), for National Kidney Foundation of Wisconsin's general use and purpose in the State of Wisconsin.

I hereby give, devise and bequeath ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to National Kidney Foundation of Wisconsin, Inc., a nonprofit organization located at 10909 W Greenfield Ave, Ste 201, West Allis, WI 53214 (Federal Tax ID #39-1133761), for National Kidney Foundation of Wisconsin's general use and purpose in the State of Wisconsin.

LIFE INSURANCE: Consider donating a life insurance policy you no longer need or name National Kidney Foundation of Wisconsin, Inc. as a beneficiary in an existing policy.

RETIREMENT PLAN: Did you know that 60-70% of your retirement assets may be taxed if you leave them to your heirs at your death? By naming National Kidney Foundation of Wisconsin, Inc. as a beneficiary of your retirement assets, such as an IRA, 401(k), 403(b) or other tax deferred plan, there is no income or estate tax imposed because we are a qualified nonprofit.

STOCKS & APPRECIATED SECURITIES: Did you know that stock gifts can be more beneficial than giving a cash donation to NKF? Donating appreciated securities, including stocks or bonds, is a simple and tax-effective way for you to make a gift to National Kidney Foundation of Wisconsin, Inc. Receive a charitable income tax deduction and avoid paying capital gains tax on the sale of appreciated stock. Please contact Carolyn Spath at 414-897-8669 x 14 or cspath@kidneywi.org to learn more.

PLEASE NOTE: National Kidney Foundation of Wisconsin, Inc. is an affiliate of a larger national organization. If you prefer that 100% of your generous gift be used in Wisconsin, please specify "to be used in the State of Wisconsin" when making your contribution or gift plan.

Lifesaving education, research, and advocacy since 1968

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414.897.8669 | info@kidneywi.org | www.kidneywi.org