

Your Life Story

When you consider your life story, how do you want to be remembered? Even with all you've accomplished, you have the opportunity to have an even greater impact and ensure the future of NAMI, the National Alliance on Mental Illness.

A gift left to NAMI in your will or trust or by beneficiary designation is a way to communicate your values and your dreams for the kind of future you hope your children and grandchildren will inherit. You may be surprised to learn that there are many ways of creating your legacy that:

- Cost you nothing now. Your gift transfers to NAMI only after you pass away.
- Give you flexibility. You can change your beneficiaries at any time so you are not locked into a decision you make today.
- Are welcome in any amount, with no minimum.
- Enable you to make loved ones and NAMI your beneficiaries.

The following are some of the easiest ways to create your legacy.

A Gift From Your Will or Trust

A gift from your will or trust is an easy and effective way of ensuring that your support of NAMI continues for generations to come.

- ▶ To leave the majority of funds to your loved ones, name NAMI to receive a specific amount or percentage of your estate.
- ▶ To leave NAMI what's left after loved ones are provided for, use a residuary bequest.
- ▶ To leave your estate to family and friends, unless you outlive one of your beneficiaries, use a contingent bequest. This is often used by spouses who stipulate that if the other spouse is not living, then the bequest specified for that spouse will go to NAMI.

Gifts of Retirement Plan Assets

Most retirement plans are subject to income and possibly estate taxes when transferred to loved ones other than your spouse. That's why, from a tax perspective, the best legacy gift is often from a retirement plan. By designating NAMI as beneficiary of your retirement plan you can:

- ▶ Leave other, less heavily taxed assets to your family;
- ▶ Change your beneficiaries at any time, retaining maximum flexibility; and
- ▶ Take action without the expense of an attorney. Simply request a change of beneficiary form from your plan provider and include NAMI as a full or partial beneficiary.

Gifts of Life Insurance

Many people purchase life insurance policies to provide financial security for a spouse, child or other loved one. But over time, the needs of your family may change. A life insurance policy that has outlived its original

purpose may be a wonderful way to create your legacy. You can do either of the following:

1. *Request a change of beneficiary form from your life insurance company and make NAMI a beneficiary. You retain the flexibility to change your beneficiaries at any time.*
2. *Sign over a fully paid policy. You will be allowed a tax deduction for your generosity.*

Gift from Your Donor Advised Fund

Final distribution of contributions remaining in a donor advised fund is governed by the contract you completed when you created your fund. Consider naming NAMI the beneficiary of your account. Or, you can designate that NAMI receive a portion of the account value, leaving the remainder for your loved ones to continue your legacy of philanthropy.

To designate NAMI as a beneficiary of your retirement account, life insurance policy or donor advised fund, please use the following information:

National Alliance on Mental Illness (NAMI)
4301 Wilson Boulevard, Suite 300 VA 22203
EIN: 43-1201653

DESIGNATION OF BENEFICIARY(IES)				
The sum of all primary designations must total 100% and the sum of all contingent designations must total 100% (e.g., allocation of three primary beneficiaries could be 34%, 33%, 33%).				
Primary Beneficiary Designation				
Full Name (Last, First, Middle Initial)	Relationship	SSN/TIN	Address (Street, City, State, ZIP)	Share %
Smithson, James C.	Spouse	123-45-6789	123 Main St., Anytown, US 12345	50%
Chapman, Shelly L.	Sister	222-22-2222	456 Main St., My Town, US 45678	25%
National Alliance on Mental Illness (NAMI)		43-1201653	4301 Wilson Boulevard, Suite 300 Arlington, VA 22203	25%
TOTAL:				100%
In the event said primary beneficiaries predecease me, I designate as contingent beneficiary:				
Contingent Beneficiary Designation				
Full Name (Last, First, Middle Initial)	Relationship	SSN/TIN	Address (Street, City, State, ZIP)	Share %
National Alliance on Mental Illness (NAMI)		43-1201653	4301 Wilson Boulevard, Suite 300 Arlington, VA 22203	100%
TOTAL:				100%

What You Should Know

You are in no way obligated to do so, but we hope you will let us know if you have included a gift to NAMI in your estate so we can welcome you to NAMI's Iris Circle—a select group of NAMI supporters who are dedicated to ensuring NAMI's ability to serve generations to come. Providing us with notice of your intention is the best way to ensure that we receive the gift you have planned for us, and we are better able to honor your wishes when we know of them in advance. Another way of ensuring that your gift reaches us is to use the following language and legal designation:

“I give, bequeath and devise (the sum of \$____), (describe real or personal property) or (____% of the residue of my estate) to be used for general purposes to the National Alliance on Mental Illness (NAMI), a qualified 501(c)(3) charitable organization, EIN: 43-1201653 and located at 4301 Wilson Boulevard, Suite 300 Arlington, Virginia, 22203, or its successor organization.”

As a member of NAMI's Iris Circle, you will receive invitations to exclusive NAMI events, as well as *NAMI Voice* newsletter and *Advocate* magazine.

WE'RE HERE TO HELP!

If you want to include NAMI in your will or trust and have any questions, please contact us at **1-888-999-NAMI (6264)** or **legacy@nami.org** and we will be happy to assist you.



4301 Wilson Boulevard, Suite 300 • Arlington, VA
 22203 Telephone: 1-888-999-NAMI (6264)
 Email: legacy@nami.org • Web site: www.nami.org