

## Making a Bequest to Christian Brothers of the Midwest

A gift in your will or  
trust can create a  
lasting legacy

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## What is a Bequest?

A bequest is a gift from your estate – it can be a transfer of cash, securities, or other properties. There are a few ways you can make a bequest to Christian Brothers of the Midwest – you can include language in your will or living trust leaving a portion of your estate, or you can designate Christian Brothers of the Midwest as a beneficiary of your retirement account or life insurance policy.

## Advantages of Making a Bequest



### REMEMBERING CHRISTIAN BROTHERS OF THE MIDWEST WITH A BEQUEST COMES WITH MANY ADVANTAGES FOR YOU:

- **Flexible** – assets remain in your control during your lifetime should you need them.
- **Revocable** – a gift designation can be changed in the future.
- **Possible tax savings** – if your estate is subject to federal estate taxes, your gift to Christian Brothers of the Midwest will qualify for an estate tax charitable deduction.
- **Heritage society membership** – As part of the Heritage Society you join more than 150 benefactors who know that the legacy they leave will be that of a better world by assuring young people will have the tools they need for a lifetime of service and success.

## Planning Your Bequest

### WHEN MAKING YOUR BEQUEST, CONSIDER HOW YOU WANT YOUR GIFT TO BE USED

You can make an **unrestricted bequest** where we use the gift for whatever is our most pressing need at the time.

Or, you can make a **restricted bequest**, and designate your gift to a particular program, such as student financial assistance, care for Senior Brothers, Vocations, or Lay Formation. If you are considering a restricted bequest, please contact us so we may ensure that the intent of your gift is understood and to thank you for your generosity.

## Creating a Legacy at Christian Brothers of the Midwest



At Christian Brothers of the Midwest, we change the world one person at a time. Our mission is teaching minds and touching hearts with the love of Christ, and preparing those entrusted to our care for a successful life in the world. It's all about building relationships and accompanying the young as they grow, giving them the tools needed for success.

When you make a bequest, you help us to serve God by continuing His work. Only through your generosity may we provide the education and values our young people need to live lives of character, dignity, and service in a world in which these qualities are very much needed.

### Sample Language

Christian Brothers of the Midwest's legal name is Christian Brothers of the Midwest, Inc. Our Tax ID number is **36-4027959**.

#### **GENERAL BEQUEST OF A STATED SUM OF MONEY MAY BE WORDED:**

"I give to Christian Brothers of the Midwest, Inc., 7650 S. County Line Road Burr Ridge, IL 60527, an Illinois nonprofit corporation, or its successor, Federal Tax Identification Number 36-4027959 [insert here the exact dollar amount]."

#### **SPECIFIC BEQUEST OF A CERTAIN ASSET FROM YOUR ESTATE MAY BE WORDED:**

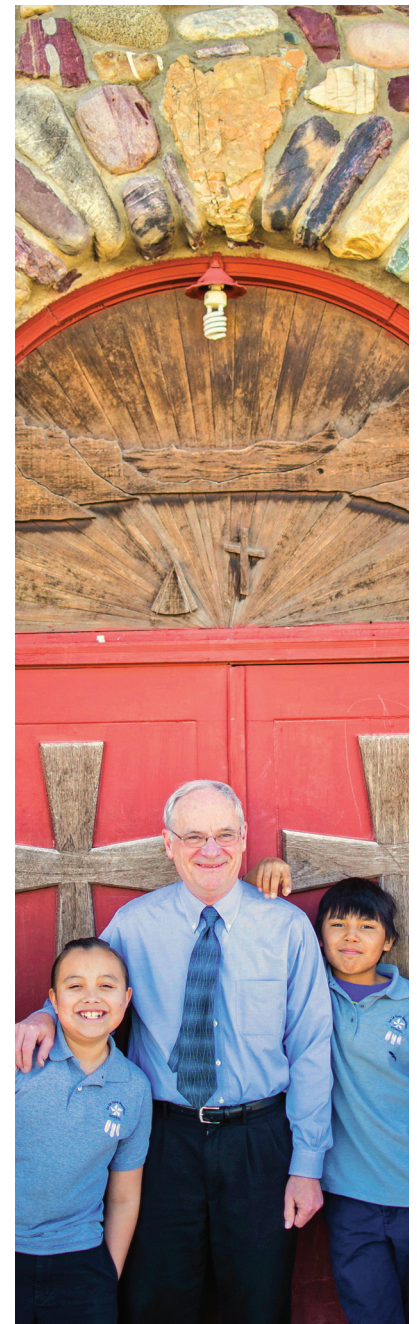
"I give to Christian Brothers of the Midwest, Inc., 7650 S. County Line Road Burr Ridge, IL 60527, an Illinois nonprofit corporation, or its successor, Federal Tax Identification Number 36-4027959, [insert here a description of the particular property]."

#### **RESIDUARY BEQUEST, AFTER OTHER BEQUESTS AND EXPENSES HAVE BEEN PAID, MAY BE WORDED:**

"I give to Christian Brothers of the Midwest, Inc., 7650 S. County Line Road Burr Ridge, IL 60527, an Illinois nonprofit corporation, or its successor, Federal Tax Identification Number 36-4027959, all [or a portion] of the rest, residue and remainder of my estate."

#### **CONTINGENT BEQUEST IF THE PERSON MAKING THE WILL IS NOT SURVIVED BY CERTAIN INDIVIDUALS:**

"If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to Christian Brothers of the Midwest, Inc., 7650 S. County Line Road Burr Ridge, IL 60527, an Illinois nonprofit corporation, or its successor, Federal Tax Identification Number 36-4027959, [insert here the exact dollar amount, description of property, or percentage of residual estate]."



## Contact Us



**CHRISTIAN BROTHERS OF THE MIDWEST IS HAPPY TO HELP YOU WHEN MAKING A BEQUEST. PLEASE CONTACT:**

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Director of Development  
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Christian Brothers of the Midwest

## Join the Heritage Society



Letting Christian Brothers of the Midwest know about your intention to make a bequest welcomes you to the Heritage Society, a group of extraordinary individuals who remember the Christian Brothers and our Lasallian Mission in their estate or financial plans. Their visionary commitment builds on the Brothers' legacy of a humane and Christian education for all.

The Heritage Society is currently over 150 members strong, living and deceased, representing numerous planned gifts to benefit the Lasallian Mission. In addition to operating support, countless scholarships and program-specific funds for Senior Brothers, Vocations, and Lay Formation have been created through planned gifts. The commitments help ensure a promising future for our Brothers, Lay Partners, and ministries across the region.

When you make a bequest, you share in and advance our mission. If you have included the Christian Brothers of the Midwest in your estate plans, please let us know. We would like to thank you for your generosity, make sure the purpose of your gift is properly understood, and recognize you as a member of the Heritage Society.

