



**Leaving a legacy for every child** The 1829 Circle honors those who have arranged a planned gift for Perkins School for the Blind. Anonymous members are welcomed. A gift by will or trust can help you:

- Create a future gift for Perkins
- Retain control of your assets during your lifetime
- Maintain flexibility if your plans change
- Enjoy potential estate tax benefits, such as reducing or eliminating estate taxes

**Discover a simple, revocable gift that meets your needs and helps secure Perkins' future.**



**// We wanted to leave something behind that would help Perkins students get ahead."**

-Larry and Lois Ruttman, Brookline, MA



**The impact of your bequest** Your gift provides essential resources to sustain and strengthen Perkins' mission, meet unforeseen challenges, and plan for the future. Best of all, by including us in your plans, you can lead the way and inspire others in the Perkins community.

This information is provided for illustrative purposes only and should not be considered legal or financial advice. We encourage you to discuss these giving options with your own legal and financial advisors.

A bequest is a gift established through your will, trust, or other estate plan and enacted at the end of your life. Bequests have strengthened Perkins School for the Blind for generations and can help you to create a legacy at Perkins.

### **Design a bequest that works for you.**

Bequests may be expressed as a specific amount, a particular asset, a percentage of your estate, or a contingency if other heirs do not survive you. Bequests are fully revocable and can be adapted if your plans change. They may also help you to reduce or avoid estate taxes. Please consult your advisors for information specific to your situation.

### **Sample bequest language:**

"I give the (sum of dollars or percentage of estate) to the Trustees of Perkins School for the Blind, located in Watertown, Massachusetts, Federal Tax Identification Number 04-2103616, to be used for the school's general purposes."

For additional sample language and information, visit [Perkins.org/PlannedGiving](https://Perkins.org/PlannedGiving)

**Every bequest, regardless of amount, is a special gift and is deeply appreciated.**

### **Beneficiary designations**

Similar giving options include gifts made by beneficiary designation, such as the proceeds from an individual retirement plan or other financial accounts.

- Beneficiary designations are often the easiest type of planned gift to do. All you have to do is name Perkins School for the Blind as a full or partial beneficiary of the remainder of your **IRA, 401(k), 403(b), tax-deferred annuity, financial accounts or other qualified retirement plans.**
- Simply request a change of beneficiary form from your plan administrator and name the Trustees of Perkins as a partial (percentage or dollar) or full beneficiary upon your passing.

### **We're here to help**

The Office of Planned Giving is pleased to provide you with information on gifts through your estate and other planned gifts. Contact us at **617-972-7667** or [Jennifer.Volpe@Perkins.org](mailto:Jennifer.Volpe@Perkins.org). We look forward to hearing from you!

