

Advisor's Guide

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is essential that the legal name of the charity, city and other identifying details be used. To name The Church of St. Luke in the Fields in a will or trust, please consider the following suggested language:

Residual Bequest — A residual bequest comes to us after one's estate expenses and specific bequests are paid.

I give and devise to The Church of St. Luke in the Fields (Tax ID # 13-2861673), located at 487 Hudson Street, New York, NY 10014, all (or state a 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 — Naming The Church of St. Luke in the Fields as a beneficiary of a specific amount from one's estate is simple.

I give and devise to The Church of St. Luke in the Fields (Tax ID # 13-2861673), located at 487 Hudson Street, New York, NY 10014, the sum of \$_____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest — The Church of St. Luke in the Fields 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 name) is not living at the time of my demise, I give and devise to The Church of St. Luke in the Fields (Tax ID # 13-2861673), located at 487 Hudson Street, New York, NY 10014, the sum of \$ (or all or a 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:

Please contact Simone Richmond, at 212-414-7442 or legacy@stlukeinthefields.org, for a stock transfer form.

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 Simone Richmond.

Legal Name: The Church of St. Luke in the Fields

Tax I.D. Number: 13-2861673

Incorporated In: New York, NY

Note to Attorneys, Accountants and other Professional Advisors: Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Simone Richmond, St. Luke's Outreach and Development Manager, by calling 212-414-7442, or writing legacy@stlukeinthefields.org.