Creating Your Will

THE SALVATION ARMY
PLANNED GIVING DEPARTMENT
WESTERN DIVISION
Serving Nebraska, South Dakota
and Western & Central Iowa

10755 Burt Street
Omaha, NE 68114
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www.SalArmyGiving.org

If you would like more information about how a gift through your Will could support the mission of The Salvation Army, please contact:

THE LIGHT BRIGADE SOCIETY MEMBERSHIP

Please complete this form and send to our Planned Giving office, or call us at (402) 898-7700

I already qualify for Membership:

☐ I have named The Salvation Army in my Will or estate plans.

☐ I have named The Salvation Army the beneficiary of another gift plan:

☐ Other (please specify):

I need more information about The Light Brigade Society:

☐ Please send me information on how to include The Salvation Army in my Will.

☐ Please send me information about charitable gifts to The Salvation Army that provide income for my lifetime.

Name

Address

City State Zip Code

Phone Number

www.SalArmyGiving.org
Your Will and The Salvation Army

Your Will is an important way to provide for family, friends and charitable organizations when you pass on. When making your Will it is important to consult a legal advisor to ensure your wishes are legally recorded and reflect your wishes to leave a particular gift or portion of your estate to The Salvation Army. If you’ve already prepared your Will but wish to make additions, a simple codicil may be all that is needed.

The benefits of including The Salvation Army in your Will include:

- The financial security of knowing your assets remain totally available to you during your lifetime
- Retained control over the final distribution of your assets
- Potential estate tax savings

Bequests may include:

- A specific sum of money
- A percentage of an estate
- A particular asset such as property, works of art, shares and an insurance policy
- The residual of an estate (i.e. what remains after all other gifts and costs have been distributed)

One benefit of a gift through a Will is that it enables you to further the good works of an organization you volunteer with or support. A charitable bequest can also help you save estate taxes by providing your estate with a charitable deduction for the value of the gift.

Maintain a current inventory

People often fail to make a simple list of their valuable assets. Keeping a clear, up-to-date inventory can make the process of creating a Will much easier and less stressful. Tangible items may include, but are not limited to, the value of checking or retirement accounts, investment principal, certificates of deposit, jewelry or antiques.

Pay on death accounts

There are also ways to make a gift through your estate plan outside of your Will. Many states allow P.O.D. (pay on death) accounts, allowing you to name a beneficiary of almost any financial account in your name: savings, checking, CD, etc., through a simple beneficiary designation. You can indicate your deposit will be “payable on death” to a charitable organization of your choosing while retaining the right to change or revoke the arrangement at any time.

When deciding to make a gift to The Salvation Army in your Will, you have the opportunity to make your wishes known about future use of the gift. Therefore, in addition to seeking assistance from a trusted legal advisor, it is beneficial to discuss your intentions with The Salvation Army’s Planned Giving Department before arrangements are finalized. This helps to ensure that The Salvation Army will be able to utilize the funds in accordance with your specific wishes.

This information is intended solely to inform you of a potential gift planning opportunity. You may wish to speak with your tax advisor or legal representative about your particular needs.

Recognition

Upon receiving notice that you have chosen to include us in your Will, you become a distinguished member of The Salvation Army’s Light Brigade Legacy Society – a membership reserved for Legacy Gift donors.

A Legacy Gift can be completed during a person’s lifetime or through an estate gift.

Qualifying Legacy Society Gifts include:

- Inclusion in Will or Trust
- Life-income gifts such as Charitable Gift Annuity
- Gifts by beneficiary designation, such as life insurance, retirement plans or accounts