



Gift Planning

Beneficiary Designations: Are you passionate about supporting Memory Matters even after your lifetime? It's not only possible, but it's also easy to do with a beneficiary designation. Just name Memory Matters as a beneficiary to receive assets such as retirement plans and life insurance policies after you're gone. This approach is straightforward, as you can complete the Legacy Builders document form entirely separate from your will. View our beneficiary designation language to find specific wording to use.

SAMPLE BEQUEST LANGUAGE

Type of Bequest	When to Use It	How to Say It
General Bequest	Use this type of bequest if you wish to give Memory Matters a state sum of money.	"I give \$_____ to Memory Matters (Tax ID 58-2291775), Mailing Address: PO Box 22330, Hilton Head Island, SC 29925."
Percentage of Remainder Bequest	Use this type of bequest if you wish to give Memory Matters a percentage of what is left of your estate after caring for loved ones.	"I give to Memory Matters (Tax ID 58-2291775), Mailing Address: PO Box 22330, Hilton Head Island, SC 29925, a sum equal to _____ percent of the rest, residue and remainder of my estate."
Contingent Bequest	Use this type of bequest if you wish to make a gift to Memory Matters only on the condition that a certain event must occur first.	"I give to \$_____ to my wife, Jane, provided she survives me; otherwise, I give to Memory Matters (Tax ID 58-2291775), Mailing Address: PO Box 22330, Hilton Head Island, SC 29925."