



Connecting Students & Volunteers  
for Results that Count

o 1100 South Mint Street, Suite 208  
m PO Box 30623, Charlotte, NC 28230  
o 704.931.3209 [hearttutoring.org](http://hearttutoring.org)

## Make a Bequest

Please remember Heart Tutoring students in your will and trusts. Planned, or deferred giving allows donors to help Heart students now and in the future. Multiple options are available for a variety of situations. For specific information, Heart Tutoring suggests you talk to your financial and tax advisers.

### Simple Bequest Language Examples

- **GENERAL BEQUEST:** If you intend to leave an outright gift of cash, securities, or other property by designating a specific dollar amount, a particular asset, or a fixed percentage of your estate to Heart Math Tutoring to be used for general purposes: "After taking care of all expenses, debts and other provisions, I give, devise and bequeath [\_\_\_ percent of the rest and residue] / [or \$\_\_\_ if a specific amount] to Heart Math Tutoring Inc. a North Carolina-based charitable organization (TIN: 46-4366030) with administrative offices at 1100 S. Mint Street, Suite 107 Charlotte, NC 28203. Mailing address is P.O. Box 30623 Charlotte, NC 28230
- **SPECIFIC BEQUEST:** If you intend to make an outright bequest for a specific purpose: "I, [name], of [city, state, ZIP], give, devise and bequeath to Heart Math Tutoring Inc., a North Carolina-based charitable organization (TIN: 46-4366030), [written amount or percentage of the estate or description of property] for its charitable purposes, including but not limited to \_\_\_\_\_ use and purpose."
- **CONTINGENCY BEQUEST:** If you wish to make a contingency gift so that Heart Math Tutoring will receive a portion of your estate if your named beneficiary does not survive you: "If any of the beneficiaries named in this will should die before becoming entitled to receive their distributive share of my estate, I direct my trustee to pay or transfer the share to which such beneficiary would otherwise be entitled, to Heart Math Tutoring Inc., a North Carolina-based charitable organization (TIN: 46-4366030), for its unrestricted use and purpose."

### Beneficiary Designation Language Examples

- **DONOR ADVISED FUND:** You can create a grant recommendation from your donor-advised fund to support Heart Math Tutoring. Final distribution of contributions remaining in a donor-advised fund is governed by the contract you completed when you created your fund. We hope you will consider naming Heart Math Tutoring as a "successor" of your account. Or, you can name us as the successor for a portion of the account value, leaving the remaining portion for your heirs.

- **QUALIFIED RETIREMENT ACCOUNT OR OTHER FINANCIAL ACCOUNT:** To designate Heart Math Tutoring as a beneficiary of a qualified retirement plan or other financial account, please use the following information: Heart Math Tutoring Inc., a North Carolina-based charitable organization (Tax IN: 46-4366030) located at 1100 S. Mint Street, Suite 107 Charlotte, NC 28203.

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Please contact Heart Math Tutoring at 704-931-3209 if you have any questions about planned giving.

**As with all gift planning, you should consult with your tax advisor and lawyer to determine what planned gift strategy is best for your current tax situation and income requirements. Consulting estate-planning professionals will help ensure that your wishes to make a lasting impact will be fulfilled.**

**Information contained herein was current at the time of posting. Nothing stated herein shall constitute or be deemed to constitute legal, tax or other professional advice. For such advice, please consult an attorney, tax or other professional advisor.**