



## Legacy Giving by Beneficiary Designation

### FINANCIAL ACCOUNTS, RETIREMENT PLANS & INSURANCE POLICIES

While many assets are transferred through a will or trust, most retirement plans, financial accounts, and life insurance policies are managed through separate documents. Set up a Beneficiary Gift to leave a lasting impact.

A beneficiary designation is an easy way to support The Wild Adventure. All it takes is filling out a form to name the people or charities you want to benefit and the percentage each should receive. You can use this option with different types of assets, including:

### RETIREMENT ASSETS

You can name The Wild Adventure as the beneficiary of your retirement accounts, which allows you to control the asset transfer at your death without changing your will or trust. This is one of the most tax-advantaged ways to give. Retirement assets left to individuals are taxed, while a nonprofit receives assets without 100% of the funds.

### LIFE INSURANCE

You can designate The Wild Adventure to receive all or part of the death benefit from your life insurance policy by completing a form with your insurance company. Alternatively, transferring ownership of the policy can give you an immediate tax deduction.

### OTHER ASSETS

**Commercial Annuities:** You can name The Wild Adventure to receive any remaining value from an annuity after your lifetime.

**Bank Accounts:** You can direct your bank to transfer all or part of what's left in your checking or savings account to the Wild Adventure.

**Investment Accounts:** You can instruct your investment company to transfer some or all investments to The Wild Adventure. In some cases it's as easy as adding "T.O.D. to The Wild Adventure" to the name on your account.

### ORGANIZATION INFORMATION

Priority Living dba The Wild Adventure

Tax ID number: 33-0141608

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