



## Leave a Legacy of Hope: Create a Planned Gift for Hope After Loss

Including Hope After Loss in your estate plan is a meaningful way to ensure that compassionate support, connection, and care remain available to families for generations to come. A legacy gift allows your values to live on, creating lasting impact long after your lifetime.

### How to Include Hope After Loss in Your Will or Trust

Many donors choose to leave a bequest, a gift made through a will or living trust. This can be a specific dollar amount, a percentage of your estate, or the remainder after other commitments are fulfilled.

**Sample bequest language:** "I give [specific amount, percentage, or residue] to Hope After Loss, Inc., a 501(c)(3) nonprofit organization, to be used to further its mission."



### Let Us Thank You

When you notify us of your planned gift, you join a special community of supporters whose generosity helps secure the future of our work. You may choose to be recognized publicly as a Legacy Circle Member or remain anonymous, but all are honored for the enduring hope their gift provides.

#### The Legacy Circle

The Legacy Circle honors individuals who include Hope After Loss in their estate plans, ensuring that compassion and support continue for generations to come. By choosing to leave a legacy gift, donors affirm their belief in our mission and create lasting impact beyond their lifetime. These meaningful gifts may be directed to the area closest to your heart or left unrestricted to strengthen our programs and long-term stability.



### Interested in Learning More?

We would be honored to speak with you confidentially about planned giving opportunities and how your legacy can support families for years to come. Please contact Jennifer Cretella-Brown at [jennifercb@hopeafterloss.org](mailto:jennifercb@hopeafterloss.org) or 203-204-3903.



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## Other Simple Ways to Leave a Legacy

### 1. Retirement Accounts (IRA, 401(k), 403(b))

Naming Hope After Loss as a beneficiary of your retirement account is one of the easiest and most tax-efficient ways to make a legacy gift.

How to set it up:

- Log in to your retirement account or contact your plan administrator.
- Request or download a Beneficiary Designation Form.
- List Hope After Loss, Inc. as a primary or contingent beneficiary for a percentage or specific amount.
- Return the form to your plan provider.

*This type of gift may reduce taxes for your estate while supporting our mission.*

### 2. Life Insurance Policies

If you have a life insurance policy you no longer need for family protection, you can use it to create a lasting legacy.

How to set it up:

- Contact your insurance company and request a Change of Beneficiary Form.
- Name Hope After Loss, Inc. as a full or partial beneficiary.
- Submit the completed form to your insurer.

*This allows you to make a significant future gift without affecting your current finances.*

### 3. Donor Advised Funds (DAFs)

If you have a DAF, you can name Hope After Loss as a beneficiary of the remaining balance after your lifetime.

How to set it up:

- Log in to your DAF account (Fidelity Charitable, Schwab Charitable, Vanguard Charitable, or a community foundation).
- Locate the Legacy or Beneficiary Designation section.
- Add Hope After Loss, Inc. as a beneficiary for all or part of the fund.

*This ensures your philanthropic values continue beyond your lifetime.*

### 4. Investment or Bank Accounts (TOD/POD Designations)

Many financial institutions allow you to transfer assets directly to a nonprofit through a Transfer on Death (TOD) or Payable on Death (POD) designation.

How to set it up:

- Contact your bank or financial advisor.
- Request a TOD/POD form for your account.
- Name Hope After Loss, Inc. as the beneficiary.
- Return the completed form to your institution.

*This avoids probate and ensures your gift is delivered efficiently.*