

Marian Fathers of the Immaculate Conception
ASSOCIATION OF  MARIAN HELPERS

GIFT BY BENEFICIARY DESIGNATION

Donors like you frequently tell us, “I wish I could do more.” You can! You can help support our mission for many years to come, after providing for yourself and your family, by naming the Marian Fathers as a beneficiary of any of these types of accounts:

- Retirement Accounts
- Life Insurance Policies
- Bank or Brokerage Accounts
- Certificates of Deposit
- Donor Advised Fund

Benefits:

- It’s easy to arrange.
- You retain control of your account or policy.
- You can change beneficiaries at any time during your life.
- A gift from your IRA may allow you to save on taxes or reduce the tax burden for your heirs.

How to make your gift:

1. CONTACT your retirement plan administrator, bank, broker or insurance company and request a beneficiary form. This form—not your will—determines how these assets are distributed.
2. WRITE in “Marian Fathers of the Immaculate Conception of the B.V.M.” as beneficiary [or partial beneficiary] using our federal tax identification number: 20-8599090 and address: 2 Prospect Hill Road, Stockbridge, MA 01262. For a date of birth, use our date of incorporation: February 23, 2007.
3. SIGN THE FORM AND RETURN it to your plan administrator, and keep a copy for your records.

Please let us know your plans, so that we may have the joy of thanking you.
We would also like to send you a helpful booklet called
Important Personal Records and A Letter to My Loved Ones.

Useful information for you and your advisors

Federal Tax Identification number: **20-8599030**

Legal name: **Marian Fathers of the Immaculate Conception of the B.V.M.**

Address: **2 Prospect Hill Road, Stockbridge, MA 01262**

Questions? Contact Ellen Miller at 413-298-1380 or EMiller@Marian.org