

PLAN USA

SUGGESTED LANGUAGE FOR BEQUESTS

I. SUGGESTED FORM OF GENERAL LEGACY

Sample Language:

*I give and bequeath to Plan International USA Inc. d/b/a Plan USA, a charitable corporation of the State of New York with offices at 155 Plan Way, Warwick, Rhode Island 02886, (**Insert specific dollar amount or percentage of estate/ residue**) to be used for its general corporate purposes (see explanation below).*

OPTION: *In addition, I designate this bequest as a Memorial contribution to be known as the _____ Memorial Fund.*

Explanation:

This type of legacy will be placed in either our Children's Fund or the Estate Grants Fund depending on which has the greater need at the time of distribution. The Estate Grants Fund supports the growth of our programs and meets critical needs in the provision of services for community programs worldwide. The Children's Fund ensures that every child and family receive uninterrupted benefits from our programs and services should they lose their sponsor for any reason. You may also designate a bequest to our Endowment Fund which will be invested in accordance with the investment policy of the Board of Directors. All recognized investment income derived from the Endowment Fund is available for the general purposes of Plan USA, unless otherwise specified by the donor or the Board of Directors.

II. SUGGESTED FORM OF LEGACY TO SUPPORT PROGRAMS & PROJECTS

Sample Language:

*I give and bequeath to Plan International USA Inc. d/b/a Plan USA, a charitable corporation of the State of New York with offices at 155 Plan Way, Warwick, Rhode Island 02886, (**Insert specific dollar amount or percentage of estate/ residue**) to be used to support country and/or community programs and projects (see explanation below).*

Explanation:

This type of legacy will be used to support programs and projects in a particular community/country (according to your designation) or within a chosen child's community/country, as long as Plan USA is active within the specified area at the time the bequest is received. If Plan USA is not actively working in the designated community/country, the bequest will be used for the organization's general corporate purposes as outlined above.

Please Note: *It is against Plan USA policy to deliver cash bequests directly to individual sponsored children and families.*

ALSO REMEMBER THAT: *State laws govern wills, trusts, and charitable gifts made in contractual agreement. Plan USA strongly advises that you contact your legal, financial, and tax advisors when considering these types of contracts.*

III. SUGGESTED FORM OF LEGACY FOR CONTINUED SPONSORSHIP OF A CHILD

Plan USA offers two options for continuing the sponsorship of a child as outlined below:

OPTION ONE: ENDOWED SPONSORSHIP

Sample Language:

I give and bequeath to Plan International USA Inc. d/b/a Plan USA, a charitable corporation of the State of New York with offices at 155 Plan Way, Warwick, Rhode Island 02886, the amount of \$7,500 (Seven thousand five hundred dollars per child) to be used for the continued sponsorship of (number) child(ren) through Plan USA's Endowed Sponsorship Program.

Explanation:

We suggest this form of legacy, or Option Two below, for the continued support of sponsored children, for under it the probabilities are that the bequest will be exempt from estate tax as a charitable gift. If there is an absolute direction that the bequest be given directly to an individual child, the likelihood is that it would cease to qualify for exemption from estate tax under Federal Law.

OPTION TWO: GENERAL

Sample Language:

*I give and bequeath to Plan International USA Inc. d/b/a Plan USA, a charitable corporation of the State of New York with offices at 155 Plan Way, Warwick, Rhode Island 02886, (**Insert specific dollar amount or percentage of estate/ residue**) to be used for its general corporate purposes. It is my wish, but I do not direct, that Plan USA will use these funds for continued sponsorship of my current sponsored child(ren), as long as my sponsored child(ren) remain(s) eligible for help under the standards and program of Plan USA.*

Explanation:

We suggest this form of legacy or the Endowed Sponsorship for the continued support of sponsored children, for under it the probabilities are that the bequest will be exempt from estate tax as a charitable gift. If there is an absolute direction that the bequest be given directly to an individual child, the likelihood is that it would cease to qualify for exemption from estate tax under Federal Law. Any funds left over after the child(ren) graduates or otherwise leaves our sponsorship program will be placed in the Children's Fund.

Please Note: *It is against Plan USA policy to deliver cash bequests directly to individual sponsored children and families.*

ALSO REMEMBER THAT: *State laws govern wills, trusts, and charitable gifts made in contractual agreement. Plan USA strongly advises that you contact your legal, financial, and tax advisors when considering these types of contracts.*

For more information, please contact our Gift Planning Team at **1-800-556-7918**