



Unexpected Amazingness
for Families with cancer

641 Swedesford Rd.

Malvern, PA 19355

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BringingHopeHome.org



EIN: 26-1222-985

3 Steps to Making A Beneficiary Gift

Did you know that the beneficiaries named on a retirement plan, annuity contract or life insurance policy determine who will receive these funds, even if you have different beneficiaries named in your will? And while proceeds paid from life insurance policies are generally not subject to income tax, the funds that your (non-spouse) heirs receive from your retirement accounts—particularly from a traditional IRA—may be taxed multiple times. After all these taxes have been paid, your heirs may receive only a very small fraction of what you intended for them to have.

A better idea: If you planned to include Bringing Hope Home in your estate plans, consider naming us a full or partial beneficiary of your retirement assets and leave other, less taxed assets to your loved ones. Adding Bringing Hope Home as a beneficiary is as easy as filling out a form.

It's Easy As 1, 2, 3!

1 Request a “change of beneficiary” form from your plan administrator.

2 List Bringing Hope Home as beneficiary at the following address:

Bringing Hope Home

641 Swedesford Rd.

Malvern, PA 19355

EIN: # 26-1222985

3 Let us know so we can thank you!