

*The Legacy Society*  
at La Salle Academy



La Salle Academy Development Office  
Justin Talavera  
Director of Major Gifts and Grant Funding  
(212) 475-8940 ext. 204  
[jtalavera@lasalleacademy.org](mailto:jtalavera@lasalleacademy.org)  
215 East 6<sup>th</sup> Street  
New York, NY 10003-8253

## Advisor's Guide for Planned Giving

### Gifts from Wills and Trusts

When making a charitable gift to a nonprofit organization, it is vital that the legal name of the charity, city and other identifying details be used. To name La Salle Academy in your will or trust please use the following suggested language:

### Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid.

*I give and devise to La Salle Academy (Tax ID #13-5562179) located in New York, NY, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program.)*

**Specific Bequest Language** - Naming La Salle Academy as a beneficiary of a specific amount from your estate is easy:

*I give and devise to La Salle Academy (Tax ID #13-5562179) located in New York, NY, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program.)*

**Contingent Bequest Language** - La Salle Academy can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

*If (insert name) is not living at the time of my demise, I give and devise to La Salle Academy (Tax ID #13-5562179) located in New York, NY, the sum of \$ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program.)*

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## **Advisor's Guide for Planned Giving (continued)**

### **Gifts of Appreciated Securities:**

Please contact Justin Talavera for instructions on gifting securities to La Salle Academy.

### **Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:**

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Justin Talavera.

Legal Name: La Salle Academy

Tax ID #:

Incorporated in: New York, NY

### **Note to Attorneys, Accountants and other professional Advisors:**

Thank you for helping your client with his or her charitable planning. If you have any questions or concerns, please contact Justin Talavera, Director of Major Gifts and Grant Funding, at (212) 475-8940 ext. 204 or [jtalavera@lasalleacademy.org](mailto:jtalavera@lasalleacademy.org).