



, The Epsilon Educational Endowment | 2746 Beechwood Dr SE, Grand Rapids, MI 49506  
**Steve Starnes, E'01**, Epsilon Educational Endowment #4 | ✉ [steve@grandwealth.com](mailto:steve@grandwealth.com) 📞 616-802-4462

## Advisors Guide for Planned Giving

### Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used The Epsilon Educational Endowment. To name 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 The Epsilon Educational Endowment, Grand Rapids, MI, (EIN 23-7010656) 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.*

#### Specific Bequest Language

You can also name The Epsilon Educational Endowment as a beneficiary of a specific amount from your estate:

*I give and devise to The Epsilon Educational Endowment, Grand Rapids, MI, (EIN 23-7010656) the sum of \$ \_\_\_\_\_ (or " \_\_\_\_\_ shares of \_\_\_\_\_ stock") to be used for its general support.*

#### Contingent Bequest Language

The Epsilon Educational Endowment 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 individual heir's name) is not living at the time of my demise, I give and devise The Epsilon Educational Endowment, Grand Rapids, MI, (EIN 23-7010656) the sum of \$ (or "all" or " \_\_\_\_\_ percentage of the residue of my estate") to be used for its general support.*

## GIFTS OF APPRECIATED SECURITIES

The Epsilon Educational Endowment's Broker: Fidelity Brokerage Services LLC

DTC: 0226

Account number: Z40-054304

Tax ID Number: 23-7010656

## 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 Steve Starnes, E'01, Epsilon Educational Endowment #4 at [steve@grandwealth.com](mailto:steve@grandwealth.com)

Legal name: The Epsilon Educational Endowment  
Tax ID number: 23-7010656  
Address: 2746 Beechwood Dr SE  
Grand Rapids, MI 49506

**NOTE TO ATTORNEYS, ACCOUNTANTS AND OTHER PROFESSIONAL ADVISORS:**

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into wellcrafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based on information we provide.

If you have any questions or concerns, please call 616-802-4462 or email [steve@grandwealth.com](mailto:steve@grandwealth.com) ([mailto: steve@grandwealth.com](mailto:steve@grandwealth.com)).

**Disclosure:** This information is not intended as legal advice. For more specific advice, please consult your attorney or financial adviser.

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