



, 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

## 3 Steps to Making a Beneficiary Gift

Did you know that the beneficiaries named on a retirement plan or life insurance policy determine who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your estate?

If you are considering including a gift for The Epsilon Educational Endowment in your will, we have a simple solution. Name The Epsilon Educational Endowment as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

### It's Easy as 1, 2, 3!

1. Request a "change of beneficiary" form from your plan administrator.
2. List The Epsilon Educational Endowment as beneficiary at the following address:

The Epsilon Educational Endowment  
2746 Beechwood Dr SE  
Grand Rapids, MI, 49506  
EIN #: 23-7010656

3. Let us know so we can thank you!

The Epsilon Educational Endowment | 2746 Beechwood Dr SE, Grand Rapids, MI 49506 |  
[steve@grandwealth.com](mailto:steve@grandwealth.com)

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