
ADVISOR'S 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. To name Big Shoulders Fund in your will or trust please use the following suggested language:

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

“I give and devise to Big Shoulders Fund, located in Chicago, IL, 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 — Naming Big Shoulders Fund as a beneficiary of a specific amount from your estate is easy.

I give and devise to Big Shoulders Fund, located in Chicago, IL, the sum of \$_____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest — Big Shoulders Fund 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 Big Shoulders Fund, located in Chicago, IL, 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).

Gifts of Appreciated Securities:

Broker: William Blair & Company

Contact: David Dreifuss

Phone: (312) 364-8363

ddreifuss@williamblair.com

DTC # 0226

Account # GER019655

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 Amelia Drozda.

Legal Name: Big Shoulders Fund

Tax I.D. Number: 36-3490557

Incorporated In: Chicago, IL

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Amelia Drozda at (312) 751-8337.