



SENIOR LAW DAY COLLABORATIVE

Planning Your Legacy

What good work does the Senior Law Day Collaborative do?

For the past 22 years, the Senior Law Day Collaborative has provided access to the knowledge and guidance of more than 150 professionals focused on elder law and related topics, i.e., the concerns of older adults, caregivers, and people with disabilities. The Collaborative's attorneys, financial planners, geriatric care managers, and other specialists deliver free community presentations and brief one-to-one consultations at Collaborative events throughout the year. Thousands in Westchester County and beyond benefit from our services each year.

How can I help?

You can support the Senior Law Day Collaborative to enrich our educational materials and programs or tell us what is important to you.

When should I include the gift in my estate plan?

Any time you are creating or updating your will, trust, or estate plan, you will want to consider charitable gifts. Your financial advisor or attorney can provide guidance related to your personal estate, beneficiaries, income goals, taxes, and other considerations. In addition, you may find it simpler to designate the Senior Law Day Collaborative as a beneficiary to your 401 (k), IRA or life insurance policy. When you notify us of your intentions, you automatically become a member of the Legacy Society.

Must I give a large portion of my estate to join the Legacy Society?

No. We value and appreciate all gifts and believe the best gift is the one that's right for the donor. To be recognized as a Legacy Society member you only need to indicate that you have included the Senior Law Day Collaborative as part of your estate plan.

How do I plan a legacy gift?

Call your estate advisors, talk to us, or consult with both. Please fill out the "Ask Us" Button on seniorlawday.info and we will direct you to an appropriate advisor. We provide confidential conversations to prospective donors and their advisors, without pressure or obligation. Making a legacy gift is easy:

- Make a beneficiary designation or include the Senior Law Day Collaborative in your estate plan.
- Notify us of your intentions so we can invite you to be a member of our Legacy Society.
- Upon your death, we carry out your charitable intentions and handle all administrative tasks.

Why do people give to charity through their estate plans?

Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For some people, a large charitable gift during their lifetime can be financially uncomfortable since they may be uncertain about their health, wealth, and personal commitments. An estate gift may make more sense. You can still fulfill your personal goals of preserving your family name, honoring loved ones, providing for heirs, minimizing tax burdens and supporting the community you call home.

Suggested Language for wills and trusts

If you are making an outright bequest to the Senior Law Day Collaborative, we recommend the following language:

Legacy of a Specific Dollar Amount

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to the **Senior Law Day Collaborative**, a program of the *Westchester Public/Private Membership Fund for Aging Services Inc.*, a nonprofit organization located at DSPTS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550, Federal Tax ID #13-3631718, for its general use and purpose.

Legacy of Specific Personal Property

I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to the **Senior Law Day Collaborative**, a program of the *Westchester Public/Private Membership Fund for Aging Services Inc.*, a nonprofit organization located at DSPTS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550, Federal Tax ID #13-3631718, for its general use and purpose.

Legacy of Specific Real Estate

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to the **Senior Law Day Collaborative**, a program of the *Westchester Public/Private Membership Fund for Aging Services Inc.*, a nonprofit organization located at DSPTS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550, Federal Tax ID #13-3631718, for its general use and purpose.

Percentage Legacy

If you are considering making a bequest of a percentage of your estate to the **Senior Law Day Collaborative**, we recommend the following language:

I hereby give, devise and bequeath ___ percent (___%) of my total estate, determined as of the date of my death, to the **Senior Law Day Collaborative**, a program of the *Westchester Public/Private Membership Fund for Aging Services Inc.*, a nonprofit organization located at DSPS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550, Federal Tax ID #13-3631718, for its general use and purpose.

Residual Legacy

I hereby give, devise and bequeath to the **Senior Law Day Collaborative**, a program of the *Westchester Public/Private Membership Fund for Aging Services Inc.*, a nonprofit organization located at DSPS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550, Federal Tax ID #13-3631718, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for its general use and purpose.

Contingent Legacy

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to the *Westchester Public/Private Membership Fund for Aging Services Inc.*, a nonprofit organization located at DSPS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550, Federal Tax ID #13-3631718, DESCRIPTION OF PROPERTY to be used for its general use and purpose.

Restricted Legacy

If you are considering a bequest but would like to ensure that your bequest will be used for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give and meet your charitable objectives. We will also work with you and your attorney to craft language to accomplish your goals.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give flexibility should it no longer be possible for the **Senior Law Day Collaborative**, a program of the *Westchester Public/Private Membership Fund for Aging Services Inc.* to use your gift as you originally intended:

If, in the judgment of the Board of Directors of the Westchester Public Private Partnership for Aging Services, it shall become impossible for The Senior Law Day Collaborative to use this bequest to accomplish the specific purposes of this bequest, the Westchester Public Private Partnership for Aging Services may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.

For any questions, please contact Bruce Segall, at bruce@marketingsense2.com or (914) 980-4703

All lifetime gifts should be directed to:

Ms. Charlotte Nottingham, c/o DSPS 10th Fl., 9 South First Avenue, Mount Vernon, New York 10550

Phone: (914) 813-6407 **Email:** cmn9@westchestergov.com

Senior Law Day programming is under the 501(c)(3) status of Westchester Public/Private Membership Fund for Aging Services Inc. (Tax ID #:13-3631718)

**We provide free educational programs and consultations for
Westchester seniors and their families**

Visit Seniorlawday.info for more information and resources