Habitat for Humanity of Metro Louisville

We build strength, stability and self-reliance through shelter.

To Whom It May Concern:

Thank you for reaching out to us regarding information on including Habitat for Humanity of Metro Louisville in your will. I have attached a document with sample language you can include in a will or trust, including: bequest language, cash bequests or a contingency bequest.

Please consider this information as a starting point. We encourage you to work with your estate planning professional and tax and financial advisors as you consider the type of legacy gift that is right for you and your family. With all charitable gifts, it is important to consult with your attorney or financial advisor to ensure that you comply with state laws, receive maximum tax benefits, and that your wishes are accurately reflected in necessary legal documents.

Below is the information needed to designate our charity:

Legal Name: Habitat for Humanity of Metro Louisville
Tax ID (EIN) #:   58-1735528
Address: 1620 Bank Street, Louisville, KY, 40203

With your legacy gift you will help provide the strength and stability local families need to reach their full potential. Your investment in the power of home provides the foundation to build brighter futures. A stable home truly changes everything.

Bequests

The following language may help you and your attorney when drawing up a bequest that meets your needs.

General bequest: If you intend to leave an outright gift of cash, securities or other property by designating a specific dollar amount, a particular asset or a fixed percentage of your estate to Habitat for Humanity to be used for general purposes:

"After taking care of all expenses, debts and other provisions, I give, devise and bequeath ___ percent of the rest and residue [or $___ if a specific amount] to Habitat for Humanity of Metro Louisville, a Kentucky-based charitable organization [Tax ID # 58-1735528] currently with administrative offices at 1620 Bank Street, Louisville, KY 40203."

Specific bequest: If you intend to make an outright bequest for a specific purpose, such as to support advocacy or disaster response:

"I, [name], of [city, state, ZIP], give, devise and bequeath to Habitat for Humanity of Metro Louisville [Tax ID # 58-1735528] [written amount or percentage of the estate or description of property] for its charitable purposes, including but not limited to _____ use and purpose."

Contingency bequest: If you wish to make a contingency gift so that Habitat for Humanity will receive a portion of your estate if your named beneficiary does not survive you:

"If any of the beneficiaries named in this will should die before becoming entitled to receive their distributive share of my estate, I direct my trustee to pay or transfer the share to which such beneficiary would otherwise be entitled, to Habitat for Humanity of Metro Louisville [Tax ID # 58-1735528] for its unrestricted use and purpose."

Property or Real Estate Will or Trust Bequest Language:
I give, devise, and bequeath to Habitat for Humanity of Metro Louisville, a non-profit corporation located at 1620 Bank Street, Louisville, KY 40203, all of the right, title and interest in and to the real estate located at [INSERT ADDRESS OR DESCRIPTION OF PROPERTY], for its general use and purposes. Louisville [Tax ID # 58-1735528]

If at any point in time and for any reason, you wish to make changes to include Habitat in your will, you can easily amend it by using a Codicil. A codicil is a document your attorney can prepare to amend your will or trust without rewriting the entire document. The codicil adds a new gift to Habitat for Humanity of Metro Louisville while reaffirming the other terms of your will.

You will want to consult with your tax advisor and lawyer to determine which planned gift strategy is best for you. Please contact Tricia Burke at (502) 805-1657 or tburke@louisvillehabitat.org if you have any questions.

Sincerely,

Tricia Burke
Impact Giving Leader
Habitat for Humanity of Metro Louisville