



SAFE AT HOME ENDOWMENT MEMBERSHIP

An excellent way for you to support the Joe Torre Safe At Home Foundation's mission is to leave us a bequest in your will, living trust, or with a codicil. All bequests to the Foundation are exempt from State and Federal Estate and Inheritance Taxes, and is generally a revocable gift, which means it can be changed or modified at any time.

You can choose to designate that your bequest be used for a general or specific purpose- that way you have the peace of mind knowing that your gift (bequest) will be used as intended. To leave an **impactful** and **lasting legacy** and through a bequest, please consult your attorney.

TYPES OF BEQUESTS

There are a number of ways you can make a bequest to the Joe Torre Safe At Home Foundation.

1. Specific Bequest

A specific bequest involves making a gift of a specific asset such as real estate, a car, other property or a gift for a specific dollar amount. *For example*, you may wish to leave your home or a specific dollar amount to the Joe Torre Safe At Home Foundation.

2. Percentage Bequest

Another kind of specific bequest involves leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 10% of your estate to the Joe Torre Safe At Home Foundation.

3. Residual Bequest

A residual bequest is made from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 30% of the residue of your estate to the Joe Torre Safe At Home Foundation.

4. Contingent Bequest

A contingent bequest is made to charity only if the purpose of the primary bequest cannot be met. For example, you could leave specific property, such as a vacation home, to a relative, but the bequest language could provide that if the relative is not alive at the time of your death, the vacation home will go to the Joe Torre Safe At Home Foundation.



Bequest Language

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to the Joe Torre Safe At Home Foundation in your estate plan. Below is some basic bequest language to assist you:

1. Specific Bequest

If you are considering making an outright bequest to the Joe Torre Safe At Home Foundation, we recommend the following language:

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to the Joe Torre Safe At Home Foundation, a nonprofit organization located at 55 West 39th Street, Suite 600, New York, NY 10018, Federal Tax ID #03-0442514, for the Joe Torre Safe At Home Foundation's general use and purpose.

Bequest of Specific Personal Property

I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to The Joe Torre Safe At Home Foundation, a nonprofit organization located at 55 West 39th Street, Suite 600, New York, NY 10018, Federal Tax ID #03-0442514, for the Joe Torre Safe At Home Foundation's general use and purpose.

Bequest 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 Joe Torre Safe At Home Foundation, a nonprofit organization located at 55 West 39th Street, Suite 600, New York, NY 10018, Federal Tax ID #03-0442514, for the Joe Torre Safe At Home Foundation's general use and purpose.

2. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to the Joe Torre Safe At Home Foundation, 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 Joe Torre Safe At Home Foundation, a nonprofit organization located at 55 West 39th Street, Suite 600, New York, NY 10018, Federal Tax ID #03-0442514, for the Joe Torre Safe At Home Foundation's general use and purpose.



3. Residual Bequest

I hereby give, devise and bequeath to the Joe Torre Safe At Home Foundation, a nonprofit organization located at 55 West 39th Street, Suite 600, New York, NY 10018, Federal Tax ID #03-0442514, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for the Joe Torre Safe At Home Foundation's general use and purpose.

4. Contingent Bequest

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to the Joe Torre Safe At Home Foundation, a nonprofit organization located at 55 West 39th Street, Suite 600, New York, NY 10018, Federal Tax ID #03-0442514, DESCRIPTION OF PROPERTY to be used for the Joe Torre Safe At Home Foundation's general use and purpose.

Restricted Bequests

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 the Joe Torre Safe At Home Foundation flexibility should it no longer be possible for the Joe Torre Safe At Home Foundation to use your gift as you originally intended:

If, in the judgment of the Board of Directors of the Joe Torre Safe At Home Foundation, it shall become impossible for the Joe Torre Safe At Home Foundation to use this bequest to accomplish the specific purposes of this bequest, the Joe Torre Safe At Home Foundation 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.

Contact Us about Safe At Home Endowment Membership

Please contact us if you have any questions about becoming a Safe At Home Endowment member, how to make a bequest to the Joe Torre Safe At Home Foundation, or to request any additional information that might be helpful to you and your attorney as you consider making a bequest to us. In New York, please call Alan Kornblum Vice President of Development for more information at 212-880-7372, or Alan@joetorre.org. In California please call Cris Arzate, Regional Director at 424-832-7258, or cris@joetorre.org

If you have included a bequest for the Joe Torre Safe At Home Foundation in your estate plan, please contact us to let us know, as we would like to thank you and recognize you for your gift.