

# Planned Giving

For

# Educational Development



PLEASE DETACH HERE

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San Antonio, TX 78205

PLACE  
POSTAGE  
HERE

Do you want to provide a living legacy to NAPEF? Here are some suggestions:

1. IRA Required Minimum Distribution: The donor may designate NAPEF to receive the RMD. The benefit to the donor is that the contribution is nontaxable. The donor contacts the financial institution that administers the IRA to arrange the distribution of the RMD to NAPEF.
2. Wills/Trusts: Donors may contribute to NAPEF through a provision in their wills or trusts, or through amendments or codicils to those documents.



3. Investment Gifts: Individuals may donate securities to NAPEF. That provides a tax benefit to the donors. The donors would contact their investment advisor to arrange these actions.
4. Designation of Beneficiary on Financial Accounts:  
Members may designate NAPEF to receive funds “Payable on Death” on financial accounts, such as checking or savings accounts. Members would contact their financial institution to make the designation.
5. Life Insurance Proceeds: Members would contact their insurance agent to designate NAPEF as the beneficiary on an insurance policy.  
For more information, contact the NAPEF treasurer.



Name: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Phone #: \_\_\_\_\_

I'm interested in

- IRA Required Minimum Distribution
- Wills/Trusts
- Investment Gifts
- Designation of Beneficiary on Financial Accounts
- Life Insurance Proceeds

