Creating a Legacy through Beneficiary Gifts
Aside from a will or trust, are there other ways to leave a legacy gift?
A beneficiary designation is a simple and efficient method for transferring an asset directly to Garrison Forest School without having to go through your estate. Often, it is as easy as filling out a form. Beneficiary designations are especially popular for retirement plans and life insurance policies.

What are the advantages of making Garrison Forest a beneficiary?
Beneficiary designations are not only simple, but they offer you the flexibility to support Garrison Forest by leaving the school all or a portion of the proceeds from a retirement or life-insurance policy. You can also review and change your designations if your needs or priorities change. Furthermore, designating a beneficiary still allows you to use these assets during your lifetime and can offer favorable tax treatment for heirs through estate planning. As with any legacy gift, the Advancement team welcomes the opportunity to talk with you about creating a beneficiary designation.

Who can create a beneficiary designation and how can I do that?
If you have a 401(k), IRA, 403(b), or other tax-deferred retirement account or life-insurance policy, you can request a form from your program administrator that will allow you to designate who will receive the proceeds after you pass.

Interested in learning more? Please contact:

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