



NATIVITY JESUIT ACADEMY

Your Legacy Gift Today Brings Hope For The Future! Simple Ways To Make a Planned Gift

*Have you ever felt like you have wanted to do more to help further Nativity's mission?
A legacy or planned gift is one such way in which you can make a significant difference!*

Please contact **Monika Sobierajski** at (414) 645-1060, x-254 or at sobierajskim@nativityjesuit.org

BANK/BROKERAGE ACCOUNT: You can designate the balance of your bank or brokerage account to Nativity Jesuit Academy, Inc. as POD or TOD. Did you know that a POD (Paid On Death) overrides a will? By designating a charity as a beneficiary of an account, there is no need to update an existing will.

BEQUESTS: One of the easiest planned gifts to make is through a will or trust. As part of your estate plan, you can include special bequest language in your will or trust, specifying a gift to Nativity Jesuit Academy. Designating Nativity in your will does not affect your current finances and can be adjusted or revoked at any time. You can gift a specific dollar amount, a percentage of your estate or the balance or remainder of your estate.

NOTE: Always consult with a financial advisor or attorney when considering any changes or updates to an existing will or trust.

***Below are sample bequest language options to help assist you and your attorney
when considering making a bequest to Nativity Jesuit Academy***

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to Nativity Jesuit Academy, Inc., a nonprofit organization located at 1515 South 29th Street, Milwaukee, WI 53215-1912, (Federal Tax ID #39-1741141), for Nativity Jesuit Academy's general use and purpose.

I hereby give, devise and bequeath ____ percent (___%) of my total estate, determined as of the date of my death, to Nativity Jesuit Academy, Inc., a nonprofit organization located at 1515 South 29th Street, Milwaukee, WI 53215-1912, (Federal Tax ID #39-1741141), for Nativity Jesuit Academy's general use and purpose.

I hereby give, devise and bequeath ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to Nativity Jesuit Academy, Inc., a nonprofit organization located at 1515 South 29th Street, Milwaukee, WI 53215-1912, (Federal Tax ID #39-1741141), for Nativity Jesuit Academy's general use and purpose.

LIFE INSURANCE: Consider donating a life insurance policy you no longer need or name Nativity Jesuit Academy, Inc. as a beneficiary in an existing policy.

RETIREMENT PLAN: Did you know that 60-70% of your retirement assets may be taxed if you leave them to your heirs at your death? By naming Nativity Jesuit Academy, Inc. as a beneficiary of your retirement assets, such as an IRA, 401(k), 403(b) or other tax deferred plan, there is no income or estate tax imposed because we are a qualified nonprofit.

STOCKS & APPRECIATED SECURITIES: Did you know that stock gifts can be more beneficial than giving a cash donation to Nativity? Donating appreciated securities, including stocks or bonds, is a simple and tax-effective way for you to make a gift to Nativity Jesuit Academy. Receive a charitable income tax deduction and avoid paying capital gains tax on the sale of appreciated stock.

Please contact us or visit our website at <https://www.nativityjesuit.org/support/> to [download a form](#) with instructions on how you can transfer stock or bonds from your brokerage or investment account to Nativity Jesuit Academy.

