

Equipment Dealers Foundation

Thank you for considering a gift to the Equipment Dealers Foundation through your estate plan. A charitable bequest to EDF may be created through your will or trust. The language samples below are samples for your consideration. Please reach out to _____ at (e-mail) or (phone) if you have questions or would like more information.

The official name, address, and tax identification number for EDF is as follows:

Equipment Dealers Foundation
165 North Meramec Ave. Suite 430
Clayton, Missouri 63105
Federal ID # _____

Specific Bequests:

If the following language is included in your Will or Trust, EDF would receive a specific dollar amount or percentage of the assets controlled by such document:

*I, give, devise, and bequeath, [_____ (\$ _____.00) or ____ percent (__ %)],
to the Equipment Dealers Foundation, presently located at 165 North Meramec
Ave. Suite 430, Clayton, Missouri 63105, to be used for its unrestricted purposes.*

Residuary Bequests:

If the following language is included in your Will or Trust, EDF would receive a share of the residue of your estate or trust, or the entire residue of your estate or trust:

*I, give, devise, and bequeath, the residue of my [estate or trust], to the Equipment
Dealers Foundation, presently located at 165 North Meramec Ave. Suite 430,
Clayton, Missouri 63105, to be used for its unrestricted purposes.*

Other ways to include EDF:

Appreciated Assets:

A gift of appreciated assets allows you to avoid paying capital gains on the assets, and may be eligible for a charitable income tax deduction.

Life Insurance:

You may name EDF as a beneficiary of your life insurance policy.

Stocks, Bonds, Cash:

Gifts of publicly traded stock, corporate bonds, and cash all generally allow you to take a charitable income tax deduction.

IRA or Retirement Plan:

You may name EDF as a beneficiary of any IRA or retirement plan. Gifting this particular type of asset is advisable because it is generally subject to income tax.