

## ***Making future gifts using a Beneficiary Designation***

Beneficiary designations are ***easy*** and ***flexible***

You can have increased flexibility by using a beneficiary designation to transfer assets to the MEF in the future:

- ❖ Life insurance policies
- ❖ Annuities
- ❖ Saving Accounts or Certificates of Deposit
- ❖ IRAs or Retirement plans

### **NEXT STEPS:**

It only takes a few simple steps to make this type of gift.

Here's how to name the Society of American Magicians Magic Endowment Fund, Inc., Federal EIN: 22-2761202, as a beneficiary:

- 1) Contact your retirement plan administrator, insurance company agent, bank or financial institution and request a change-of-beneficiary form.
- 2) Decide what percentage (1 to 100) you would like to gift and write it on the beneficiary form.
- 3) Return the completed form to your plan administrator, insurance company, bank or financial institution.
- 4) Request confirmation and send it to our Treasurer for our records. Email it to: Richard Bowman, [MEFTRES@sammagicendowmentfund.org](mailto:MEFTRES@sammagicendowmentfund.org)