

Future Gifts Upon Death:

Naming the MEF in your Will and Trust for Future Gifts:

This is a simple and flexible way to gift in the future. You can make changes as your financial situation changes. In as little as one sentence, you can complete your future gift by including the language in your will or living trust.

Your commitment helps ensure that we continue our mission for years to come.

Next Steps:

1. Seek the advice of your financial or legal advisor to include the name of Society of American Magicians Magic Endowment Fund in your will or estate plan. This is typically done using a one page amendment.
2. When you include the S.A.M Magic Endowment Fund in your plans, please use our legal name and federal tax ID:

Legal Name: Society of American Magicians Magic Endowment Fund, Inc.
Federal EIN: 22-2761202

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 – designate donations for your required minimum distributions (RMDs)

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 or designated recipient of the gift:

- 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 the MEF Treasurer for our records. Email it to: Richard Bowman, MEFTRES@higginsmagic.com
- 5) You will receive notification of the donation.

