



Information for Bequests and Wills

Please consider leaving the Academy of the Holy Names (AHN) a charitable gift in your will so that we may continue our work to provide an independent, Catholic education for boys and girls from pre-kindergarten through 8th grade as well as an all-girls college prep high school education. All bequest gifts will be allocated to the AHN Endowment unless otherwise indicated by the donor(s). For more information on how to join the Holy Names Legacy Society, please contact Debbie Gavalas, Director of Advancement for the Academy of the Holy Names at (813) 839-5371, ext. 264, or at dgavalas@holynamespa.org.

YOU CAN BEQUEATH

- Your Individual Retirement Account (IRA) or a percentage of your IRA
- The remainder or residue of your estate (what is left over after your other bequests)
- Your entire estate or a percentage of your estate
- A specific dollar amount or specific assets
- A life insurance beneficiary or piece of real estate
- A contingent bequest that passes to the Academy of the Holy Names in the event your primary beneficiary predeceases you

POSSIBLE WORDING FOR WILLS

I Bequeath _____ to the **Academy of the Holy Names of Florida, Inc.** located at 3319 Bayshore Blvd., Tampa, FL 33629, a non-profit corporation in Hillsborough County, Florida. (Please be sure to use our complete name and address.)

CODICILS AND AMENDMENTS

If you do not want to rewrite your estate documents, you can still remember the Academy of the Holy Names by using a codicil to your will or an amendment to your trust. Usually, the cost for doing this is significantly lower than writing a new will or trust.

The Official Catholic Directory for 2010 lists the Academy of the Holy Names as a charitable non-profit organization recognized by the Internal Revenue Service. The IRS designates the Academy of the Holy Names as a 501 (c)(3) organization; and the AHN Federal Tax ID Number is 59-0910354.

Independent Counsel – All donors are encouraged to seek independent financial and legal counsel when executing wills, trusts, contracts and other agreements. The Academy of the Holy Names will provide information and assistance to donors however, the ultimate responsibility regarding evaluations, tax deductibility, and/or similar legal local, state and/or federal compliance issues rests with the donor and/or such counsel as the donor may wish to secure. Please share this information with your professional advisor(s). Additionally, please discuss your charitable wishes with your family. A copy of the page from your will listing the Academy of the Holy Names as a beneficiary is appreciated for the Advancement Office to keep on file.