



## Leaving A Legacy Through Your Retirement Account

### **All Endings Automatically Equal New Beginnings**

During your HAI workshops, you've probably heard those words more than a few times. But some endings are harder to talk about than others. Like sex, death and money are taboo subjects for many in our culture, and yet they too are an integral part of life.

### **Please Make a Bequest to HAI Global**

*If HAI has made a difference in your life, and you'd like to see the work of HAI Global continue for future generations, one of the most powerful ways you can leave a legacy is to make a bequest to HAI Global.* This document focuses on bequests made through retirement accounts, but there are many ways to make bequests to HAI Global. If you'd like to explore other donation and legacy possibilities, please contact Jason Weston, HAI Global's Executive Director ([jason.weston@hai.org](mailto:jason.weston@hai.org)) to discuss your legacy options.

### **Your Bequest to HAI Global Can Be Tax-Free**

One of the simplest steps that be taken is to designate HAI Global as a beneficiary of whatever funds remain in your retirement investment account(s) at the time of your death. It is easy to do and there are other benefits as well.

When your retirement investments have been made with pre-tax dollars (traditional IRAs, 401K, SEP IRA, etc.) they are taxed when withdrawn by the investor or transferred to heirs. However, as a non-profit organization, HAI Global can receive these funds *tax free*. For this reason, making HAI Global the beneficiary of all or part of your remaining retirement funds may be the optimal way to give for many people

Designating a beneficiary on your retirement accounts is very easy. It does not require an attorney and you do not need a Will to accomplish this. In most cases, you can simply go online or call your financial institution to specify your beneficiaries and the percentage of the account designated to each, and you can change the beneficiary and the percentage at any time.

### **Please Let Us Know**

Financial institutions are not always required to contact beneficiaries after the account holder dies. To ensure that HAI Global receives your gift, if you designate HAI as a beneficiary, please let us know.



When you have designated HAI Global as a beneficiary on a retirement account, please:

1. Fill out the attached form and send it to the HAI Global office.
2. If you have a Will, state that HAI Global is a beneficiary of your retirement account(s). This will help ensure that the executor of your estate will contact HAI upon your death.

### **How Your Bequest Will Be Used**

The generous contributions we have received so far have helped HAI transition from struggling for our very survival to a thriving, growing enterprise. Your generous bequest will give HAI Global the solid and stable financial base which will help to ensure HAI Global's future for generations to come. Some of our current goals include:

#### **Expand Training Programs for Facilitators and Volunteers Worldwide**

One of the keys to HAI's future is to have a substantial, well-trained cadre of both employees and volunteers who can deliver HAI's essential message and experience in all of our worldwide regions. Our training program already includes everything from Community Presenter Training to the training of our FITs (Facilitators in Training). Yet there is a need for ongoing training program coordination, evaluation, and management.

#### **21st Century Technology**

This past year we created and implemented a *Salesforce* cloud-based database, and brought all of our North American regions into it. This system has simplified our data collection, opened up our database for searching and analysis, modernized our marketing efforts, and improved our ability to manage the business of HAI. In addition, we created the *HeartBeat*, a HAI community social network, calendar, registration and reservation center.

This new technology platform – *Salesforce* and the *HeartBeat* – fulfills most of our requirements, but there are still a number of areas that need additional work for the platform to deliver fully on its promise. This technology requires a higher investment in ongoing upkeep, servicing and maintenance, as well as expansion opportunities.

#### **Diversity Training and Outreach**

HAI has always welcomed people from all walks of life, but we have not always been as effective as we intended to be. In the past two years we have made great strides in reaching out to people of color, and to our LGBT friends, as well as to Gen X and Y. While this is showing up as more diversity in the Room of Love, it's also clear that we have a lot more work to do in this area. Your contribution will help fund more training and outreach, and help make HAI workshops more accessible financially.

### **Thank You**

Thank you for being willing to engage in this conversation. Legacy donations are a way to ensure that the work of HAI and the dream of Stan Dale will continue long past our mortal ending. Please consider a bequest to HAI Global.



### Informing HAI Global That You Have Made a Bequest

If you have designated HAI Global as a **beneficiary in your retirement account**, to help ensure that HAI receives your gift, please fill out this form and send it to Cascade at the HAI Global office (norcal-accounting@hai.org).

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

I have included HAI Global in my estate plans:

- Through my retirement plan
- Through an insurance policy
- In my will
- Through a trust
- Other \_\_\_\_\_

If you are naming HAI Global as a **beneficiary for specified accounts in your will or trust**, please also complete the Executor information below.

Here is an example of how you can make HAI a beneficiary of your will or trust:

“I, [name], of [city, state, ZIP], give, devise, and bequeath to HAI Global [tax ID number: 26-3847947], a nonprofit organization located at 593 N. McDowell Blvd. Suite B, Petaluma, CA 94954, [dollar amount, or percent of the estate, or description of property] for its unrestricted use.”

Executor of Will or Trustee (name and contact information)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any Comments or Requests:

\_\_\_\_\_  
\_\_\_\_\_