

Leaving a Gift to American Indian Services

Supporting the future of Native American students
while having the flexibility to provide for your family today.



LEGACY FUND
AMERICAN INDIAN SERVICES

Shape The Future Of Native American Communities Without Sacrificing Your Family's Security

Through generous donations made by our supporters during our 50 years in operation, AIS has been able to leave lasting positive impacts on the lives of countless Native American students and their families. We have grown from a one man office to a 501(c)(3) public charity impacting thousands of students every year. However, our work is far from complete. Most Native Americans still lack the financial resources to attend college and they continue to have the lowest degree attainment rate of any group. It is only with sustained support from our donors that AIS will be able to continue providing the scholarships and educational programs that our constituents rely on.

We understand that making charitable donations is no small task. Many people want to donate but are not in a financial position to do so. Fortunately, there are still ways to donate without having to write a check today. Consider making a charitable bequest.



What is a Bequest?

Bequests are charitable donations made from one's will or trust. They are directly written into the will and can be changed or modified at any time. There are a few ways that bequests can be made.

- You can leave the majority of your assets to loved ones, and list AIS as the beneficiary of a specific percentage or amount.
- You can leave a residuary bequest that donates the residual amount of assets to AIS after all family members and loved ones have been taken care of.
- You can leave AIS with a set amount, no matter how big or small, with specific instructions as to how the funds would be used.

Why make a Bequest to AIS?

Native American reservations contain some of the most economically distressed areas in the United

States. This has a large impact on education. On average, only 53% of Indians attending tribal schools end up graduating high school, while only 13% are able to receive a degree in higher education. Additionally, only 17% of Native American eighth-graders are able to score within the “proficient” ranges in math. This is due to widespread poverty, households with mental health and substance abuse problems, and in many cases, racism against American Indians, among other issues. It is our goal at AIS to combat these problems by providing beneficial educational programs and scholarships to as many Natives as possible.

The mission of American Indian Services is to help Native Americans succeed through education. Each donation we receive gifts the opportunity of learning to individuals who would have otherwise gone without the privilege of education. It is our time to stand up and give back to these communities in need. Charitable bequests not only ensure that Native Americans are able to receive a quality education but allows AIS to continue its mission for many years to come. Bequests provide the promise of a stable future and longevity for our organization.

At AIS it is our promise and commitment to our donors that we will distribute donations to the Native American population in the most beneficial way possible. We will thoughtfully use donations to inspire young American Indians through the gift of education and community engagement.

Donating a charitable bequest is a great way to ensure the long-term success of an organization you believe in, especially when the money you’d like to donate may not be readily available at this time. Such a gift lends an extra layer of meaning and purpose to your retirement. It also may introduce your family and friends to habits of generosity and encourage them to follow your example.

Bequests are extremely flexible and can be changed or modified at any time, and most importantly, they are tax-deductible. Leaving a bequest to a charitable organization alleviates the burden that federal estate tax can have on family and loved ones. Furthermore, bequests are an efficient way to handle one’s estate as they contain specific and clear instructions as to how the assets are to be distributed.

Writing a Will: How to Make a Bequest

Writing a will may not seem like a top priority, however, creating the document is one of the most important duties that can be done for family and loved ones. Below is a simple guide to creating a will and how to include charitable bequests.

1. Create the Document

Creating a will is rather straightforward. Title the document “Last Will and Testament” and include your full name and address. Make sure to state that you are of sound mind and are not creating the will under duress.

2. Assign an Executor

The executor you choose will be the individual who manages the estate and carries out your wishes listed in the will. Choose your financial advisor, lawyer, or a trustworthy loved one. Consider appointing a secondary executor in the case that the first is unavailable or unable to complete the task.



3. Determine a Guardian

If you have dependent children include a section that designates who their new legal guardian will be. Make sure to discuss this step with both the children and the appointed guardian as this step is crucial to their future caregiving.

4. Identify Beneficiaries

Beneficiaries are those who will inherit your assets and property. Make sure to be as specific as possible, including full legal names of all beneficiaries and the explicit instructions outlining the distribution of your assets.

5. Outline Bequests

Next, make sure to include your charitable bequests of choice. This is where you determine what kind of bequest to leave. You can leave a specific bequest, which grants a certain set amount of your assets to the organization, a residual bequest, which leaves the residual amount of assets to the organization after all loved ones have been taken care of, or you are able to leave a bequest with highly specific instructions as to how you wish your donation to be used. Make sure to include the full name and address of the charity.

For example, if leaving a bequest to American Indian Services, the wording could be “I bequeath [dollar amount or description of property] to **American Indian Services**, a nonprofit corporation whose address is **3115 East Lion Lane, Suite 320, Salt Lake City, Utah 84121**

Donating Insurance Benefits Or Other Often-Overlooked Assets

Sometimes life insurance policies outlast their original purpose and can become a great way to create a lasting legacy with American Indian Services. To leave your life insurance to AIS, request a change of beneficiary form from your life insurance company and make American Indian Services a full, partial, or contingent beneficiary. Giving life insurance in this way allows you the flexibility to change your mind at any time, should circumstances dictate such a change.

Another simple way to create your enduring legacy is by making American Indian Services the “pay on death (POD)” or “transfer on death (TOD)” beneficiary of a bank or brokerage account or a certificate of deposit. The benefits of this include:

- The beneficiaries you name have no rights to the funds until after your lifetime.
- Until that time, you remain in control and are free to use the funds, change the beneficiary, or close the account.
- It is not necessary to designate all of the account to American Indian Services - you can designate a certain percentage of the account.

NOTE: The information in this guide is not intended as legal or tax advice. Please consult a lawyer and/or tax advisor for specific advice concerning your particular situation.

To name American Indian Services as a beneficiary of your will or trust, please use this language:

To give a specific amount or percentage: I give \$_____ or _____% to American Indian Services, a 501(c)(3) nonprofit organization with the business address of 3115 East Lion Lane, Suite 320, Salt Lake City, Utah 84121, or its successors.

To leave the remainder: After all other gifts, I give the remaining funds of my [estate/life insurance/retirement account] to American Indian Services, a 501(c)(3) nonprofit organization with the business address of 3115 East Lion Lane, Suite 320, Salt Lake City, Utah 84121, or its successors.