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Steps to take when making a bequest to Deep Roots

Estate gifts are an important source of support for Deep Roots and the families we serve. Making a bequest to Deep Roots– and thereby supporting a cause you are passionate about– is easy to do and your gift will make a world of difference in the lives of children and families who turn to us for help in building a better life. A bequest will not affect your current lifestyle, and can be easily amended to address your changing needs. The information below will help you and your attorney prepare a simple and straightforward document that clearly states what you want to have happen.

- For an outright gift of cash, securities or other property, we recommend the following language:

“I hereby give, devise, and bequeath ----- (specific details of the funds, securities, or other property) to Deep Roots, Inc., located at 21 Veazey Cove Road, Earleville, MD 21919, Federal Tax ID # 45-5115992 for Deep Roots’ general use and purpose.”
- You may simply name Deep Roots, Inc. as a beneficiary of your IRA or other qualified retirement benefits, using the same address and information as above. Your tax consultant will be able to advise you regarding the tax benefits of such gifts.
- If you prefer, you may leave a percentage of your total estate using the same information as above.
- Likewise, you may choose to leave the residual balance or remainder of your estate after all other claims have been satisfied.

To create your plan, we recommend that you consult a qualified estate planning attorney. If you or your attorney would like Deep Roots, Inc. to provide you with customized beneficiary language that is specific to your goal and interest, please feel free to contact us. Thank you for your support!