

Retirement Plan Beneficiary Designation

Name Women for Women International as a Beneficiary of Your Retirement Plan

Equip women around the world with the resources, education, and community needed to take control of their lives by making Women for Women International a full or partial beneficiary of your IRA, 401(k) or other qualified retirement plan. The taxes applied to your retirement plan assets may be greater than you think. Using retirement assets to make a donation and leaving other assets to your heirs can enable you to give more to your beneficiaries.

How it Works

Your financial advisor and Women for Women International's planned giving team can help you determine whether income from a gift plan or withdrawals from your retirement account would most benefit your heirs.

Simple Steps:

1. Name Women for Women International as the beneficiary of a qualifying retirement plan through a beneficiary designation form, ensuring assets will not be included in your taxable estate. An extra step may be required to designate a 401(k).
2. After your lifetime, the residue of your plan passes to Women for Women International free of tax and to any other named heirs.

Questions?

I'm here to help with your questions. Please reach out to me as needed.

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Helping women survivors of war and conflict rebuild their lives.

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