



### **Beneficiary Designation Gifts**

A beneficiary designation gift is a simple way to make a planned gift in support of the Marine Corps Association Foundation. You can designate us as a beneficiary of a retirement account, life insurance policy or investment or bank account.

Beneficiary designation gifts allow you to provide for your family and to support the causes that matter the most to you. Beneficiary designations are not controlled by the terms of your will.

The term beneficiary designation is the most common and is used when naming beneficiaries of retirement plans or life insurance policies. The term *Payable on Death* (POD) typically involves the designation of a beneficiary of a checking account, savings account or certificates of deposit, and *Transfer on Death* (TOD) often involves the designation of a beneficiary of stocks, bonds or mutual funds.

#### **Benefits of a beneficiary designation gift**

- Support the causes that you care about
- Continue to use your account as long as you need to
- Simplify your planning and avoid expensive legal fees
- Reduce the burden of taxes on your family
- Receive an estate tax charitable deduction
- You can update your designations at any time to meet your changing needs

To name the Marine Corps Association Foundation as a beneficiary, you can obtain a beneficiary designation form or a TOD/POD form from your account plan administrator. The form will ask for the name of the beneficiary, its address, and a tax identification number.

Marine Corps Association Foundation  
715 Broadway Street  
Quantico, VA 22134

*Tax ID: 80-0340923*

If you have already designated the Marine Corps Association Foundation as a beneficiary of an asset or as part of your estate plan, please let us know by completing our Planned Gift Statement of Intent form and returning it to us. *Your plan administrator is not obligated to notify your beneficiaries.*

By letting us know of your future gift, it will give us the opportunity to recognize you and your family as a member of the *Samuel Nicholas Society*.