



## ADVISOR'S GUIDE FOR PLANNED GIVING

### Gifts from Wills and Trusts

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city, and other identifying details be used. To name 91.5 KRCC in your client's will or trust please use the following suggested language:

### Residual Gift Language

A residual bequest comes to us after your client's estate expenses and specific bequests are paid:  
*I give and devise to 91.5 KRCC, the charitable, tax-exempt organization located in Colorado Springs, Colorado, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

### Specific Gift Language

Naming 91.5 KRCC as a beneficiary of a specific amount from your client's estate is easy:  
*I give and devise to 91.5 KRCC, the charitable, tax-exempt organization located in Colorado Springs, Colorado, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).*

### Contingent Gift Language

91.5 KRCC or its affiliates can be named as a contingent beneficiary in your client's will or personal trust if one or more of their specific bequests cannot be fulfilled:  
*If (insert name) is not living at the time of my demise, I give and devise to 91.5 KRCC, the charitable, tax-exempt organization located in Colorado Springs, Colorado, the sum of \$ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

### Gifts of Appreciated Securities

Please use the following instructions when transferring your client's securities to 91.5 KRCC:

#### For Account of:

91.5 KRCC  
Raymond James & Associates DTC #: 0725  
Account #: 24455142  
91.5 KRCC Tax ID #: 84-0402510

#### Financial Advisor:

Todd Metzger  
Raymond James & Associates 102 N. Cascade Ave., Suite 600 Colorado Springs, CO 80903  
(719) 632-0266  
Fax (719) 632-0106

[Let's Talk](#)

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As you complete your client's transfer, please contact Kathleen Bauer, Manager of Gifts and Acknowledgements, at (719) 389-6354 or [kathleen.bauer@coloradocollege.edu](mailto:kathleen.bauer@coloradocollege.edu).

For gifts of mutual funds or other investments, please contact the Office of Gift Planning.

**Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation**

Please have your client contact his/her plan provider for a change of beneficiary form. Once they have completed the form, please send a copy to Shannon Balmer, Gift Planning Officer at (719) 389-7665 or [shannon.balmer@coloradocollege.edu](mailto:shannon.balmer@coloradocollege.edu).