

MAKE YOUR MARK

A LEGACY PLANNING GUIDE FOR SUPPORTERS OF MHP

How Do You Want to Be Remembered?

Throughout our lives, there are moments when we pause to reflect on the impact we have had on our families, communities, and the world. Leaving a gift to charity is a wonderful way to create a legacy of positive change even beyond your lifetime. Leaving a gift to MHP increases access to affordable housing and strengthens the fabric of all our communities. Here are a few of the most popular ways to create your legacy with MHP.

Sign Your Name to Make Home Possible *Gifts by Beneficiary Designation*

Supporters frequently tell us, “I wish I could do more.” After all, making a gift to support your community is one of the most rewarding decisions you will ever make. The good news is, there’s an easy way to do more. You can make a lasting difference by including MHP as a beneficiary of any of these types of accounts:

- 1. Retirement Accounts**
- 2. Life Insurance Policies**
- 3. Bank or Brokerage Accounts**
- 4. Certificate of Deposits**
- 5. Donor Advised Funds**

It’s easy to do and you don’t need a will. Simply request or download a beneficiary designation form from your account administrator. Write in MHP as a partial, contingent, or sole beneficiary and sign your name.

Make A Gift that Costs You Nothing Now *Gifts in a Will or Trust*

One of the most popular ways to create a lasting legacy is by leaving a gift to MHP in your will or trust. The gift costs you nothing now but allows you to make a significant impact on families in our area for decades to come. You can take care of your family first and also leave a specific amount or percentage of your estate to MHP. Simply discuss your wishes with your attorney and provide our legal name, address, and tax identification number:

Montgomery Housing Partnership, Inc.
12200 Tech Road, Suite 250
Silver Spring, MD 20904-1938
Federal Tax ID: 52-1631939

Save on Taxes with a Gift From Your Retirement Account *Qualified Charitable Distribution*

If you are age 70 1/2 or older, you can make a charitable gift to MHP from your retirement account. Because the funds go directly to charity, you pay no taxes on the distribution. In addition, if you are over age 73, your gift counts toward your required minimum distribution. By donating retirement assets to charity and leaving other less heavily taxed assets to loved ones, you may increase the value of your estate for heirs.

To choose this tax-smart way to give, simply notify your IRA plan administrator of your intention to make a gift directly to MHP and provide the amount of your gift. Please include the following information:

Organization: **Montgomery Housing Partnership, Inc.**
Contact: **Eva Dillon, Vice President of Advancement**
Business Address: **12200 Tech Road, Suite 250**
Silver Spring, MD 20904-1938
MHP Tax ID Number: **52-1631939**

We're Here to Help

Thank you for considering this meaningful way to support MHP's work for generations to come. To notify us of a gift you have left or to discuss how you can create a legacy of compassion and hope in the DC region, please contact us. Again, thank you.



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