

## 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 Joslin Diabetes Center in your will or trust please use the following suggested language:

### Residual Bequest Language —

A residual bequest comes to us after your estate expenses and specific bequests are paid.  
*I give and devise to Joslin Diabetes Center (Tax ID #04-2203836), located in Boston, MA, 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 Bequest Language —

Naming Joslin Diabetes Center as a beneficiary of a specific amount from your estate is easy.  
*I give and devise to Joslin Diabetes Center (Tax ID #04-2203836), located in Boston, MA, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).*

### Contingent Bequest Language —

Joslin Diabetes Center can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to Joslin Diabetes Center (Tax ID #04-2203836), located in Boston, MA, 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 contact Thomas Giddens, Planned Giving Advisor for a stock transfer form.

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

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Thomas Giddens, Planned Giving Advisor.

Legal Name: Joslin Diabetes Center

Tax ID Number: 04-2203836

Incorporated In: Boston, MA

### Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Thomas Giddens at 617-309-2412 or [philanthropy@joslin.harvard.edu](mailto:philanthropy@joslin.harvard.edu).

