



Planned Giving – Retirement Plans

Retirement plan assets may be an advantageous gift since the combined effect of income and estate taxes that can result from leaving these assets to your family may be 75% or more.

We suggest that you talk with your advisors about whether this type of gift will work for you; however here are two suggestions:

1. You can make Milwaukee Habitat the beneficiary, or partial beneficiary, of your retirement plan. The procedure is relatively simple. First, obtain a beneficiary change form from the administrator of your plan. On that form indicate the amount or percentage you wish to donate to MILWAUKEE HABITAT. You can change your beneficiary again in the future, should your needs or wishes change.
2. If you include a charitable bequest in your estate plans you may want to talk with your attorney about the advantages of using your retirement plan assets to fund an estate gift to MILWAUKEE HABITAT. Please see bequests for more information.

For more information on planned giving at Milwaukee Habitat, please contact Patti Oliver, Development Officer, at 414-316-5611.