

A donor advised fund at The Signatry Charitable Trust (“The Signatry”) can be part of your estate plan in one or more of the following ways:

1. It can be listed as an heir in your last will and testament.
2. It can be listed as a trust beneficiary in your revocable or irrevocable trust.
3. It can be named as a primary death beneficiary to your life insurance policy.
4. It can be named as the primary death beneficiary to your qualified retirement account.
5. It can be listed as a payable on death (“POD”) beneficiary or transfer on death (“TOD”) beneficiary to other applicable accounts like your bank accounts or nonqualified investment accounts.

Naming a donor advised fund as an heir or beneficiary is an efficient and flexible way to continue your charitable legacy.

If your estate planning documents contain specific written instructions directing a donor advisor to make specific recommendations to certain charities and you change your recommendations, please make sure you amend your estate planning documents to describe those changes. If your estate planning documents simply make a general distribution to a donor advised fund without specific recommendations, then talk with your successor donor advisor to make sure your successor makes the proper recommendations to continue your charitable giving plan.

How do I name a donor advised fund at The Signatry as an heir or beneficiary?

We suggest sharing the wording below with your estate planning attorney or other professional advisor when identifying a donor advised fund in your estate planning documents.

The Signatry Charitable Trust, a South Dakota charitable trust (TIN: 82-5070897), designated
for The _____ Donor Advised Fund, ID # _____.

If you have listed The Signatry as part of your estate plan, please provide us with a copy of your last will and testament, trust, or beneficiary form. In the alternative, please send us a letter notifying us that you have included us in your estate plan.

When we receive your inheritance, the proceeds will be added to the designated donor advised fund. Your successor donor advisor(s) can recommend how the proceeds are invested and granted. As always, the funds remain in the legal control of The Signatry to be used only for charitable purposes and not for the benefit of you, your family, your heirs, or your estate.