

Bequests: Frequently Asked Questions

Bequests and charitable trusts are popular vehicles through which charitable support to Recovery International can be provided. They can also provide significant financial benefits for the donor and their loved ones.

- Outright bequests, as well as certain bequests in trust, are not subject to estate taxes.
- Actual cost is less than face value of gift because of tax benefits to estate.
- Bequest can take any of following forms:
 - Bequest of a dollar amount of particular securities or other property.
 - Residual bequest of all or portion of estate after payment of specific amounts to other beneficiaries.
 - Contingent bequest to take effect if other beneficiaries die before the donor.
 - A bequest can often be arranged simply with the addition of a codicil amending an existing will.

Why do I need a will?

A will ensures you're in control of your assets, and outlines how they'll be distributed to the people and causes you care about. Your loved ones won't need to make difficult decisions about the distribution of your estate.

I'd like to leave a gift to Recovery International in my will. What do I need to do?

Simply take the following wording to your estate planner for inclusion in your will.

SAMPLE BEQUEST LANGUAGE

"I give, devise, and bequeath \$_____ to Recovery International Tax ID Number: 36-2041667. Recovery International may be contacted at 1415 W. 22nd St., Tower Floor, Oak Brook, IL 60523.

OR

"I give and bequeath to the Recovery International Tax ID Number: 36-2041667 all [or state the fraction or percentage] of the rest, residue, and remainder of my estate, both real and personal the sum of \$_____, or _____ face value bonds, or _____% of my estate." Recovery International may be contacted at 1415 W. 22nd St., Tower Floor, Oak Brook, IL 60523.

These are merely suggestions as to content and should be written or adapted by legal counsel to fit the contributor's individual situation.

Should I leave a percentage or a set amount?

All bequests, whether large or small, are greatly appreciated. If you leave a percentage of your estate, this will ensure that the value of your gift will not be affected by inflation. If you choose to leave a set amount of your estate, you can specify the exact amount you wish to donate.

If I make a bequest, do I need to tell Recovery International?

If you've already directed a bequest to us or are considering it, please let us know. It helps us with planning and forecasting, and provides us with the chance to thank you and recognize you for your gift. You'll also be inducted into our **Society of Dear Ones**.

I've already included Abraham Low Self Help Systems in my will. Are you the same group?

Yes. In 2012, we changed our business name to Recovery International. If you'd like to leave us a bequest, we request that you leave it to our registered name of Recovery International.

I'm an executor of a will that includes a bequest to Recovery International. What should I do?

Please send the check, photocopy of the will, and contact information to:

Recovery International
1415 W. 22nd Street - Tower Floor
Oak Brook, IL 60523

You may also designate RI as beneficiary of a Life Insurance Policy or an Individual Retirement Account. If you need assistance with making a stock gift or other planned gift, please contact Sandra Wilcoxon at (312) 962-5991 or swilcoxon@recoveryinternational.org