Laura Payne
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3 Steps to Making a Beneficiary Gift

Did you know that the beneficiaries named on a retirement plan or life insurance policy determine who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your estate?

If you are considering including a gift for The Mission in your will, we have a simple solution. Name The Mission as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

IT'S EASY AS 1, 2, 3!

1. Request a "change of beneficiary" form from your plan administrator.
2. List "Back Bay Mission, Inc." as beneficiary at the following address:
   PO Box 288
   Biloxi, MS, 39533
3. Inform us of your intentions so we can thank you!

The information presented in this literature is not intended as legal or tax advice.

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Record of Planned Gift Intention

Thank you for completing this confidential Record of Gift Intention.
If you have any questions, please contact the Development Coordinator, Laura Payne at 228-432-0301 ext. 302.

Full Name: _____

Birth Date: _____

Daytime Phone: _____

Email Address: _____

Planned Gift (Bequest) Information
The Mission is named as a beneficiary of my will or trust:

- ☐ For a specified amount of _____.
- ☐ _____ percentage.

The Mission is named as a beneficiary of the following:

- ☐ Retirement plan
- ☐ Life insurance
- ☐ Bank, investment or other account
- ☐ Real property
- ☐ Life-income plan (Trustee's name: _____)

My gift is (circle one) RESTRICTED/UNRESTRICTED

Signature: _____

Date: _____

Please return this form to: PO Box 288
Biloxi, MS 39533