



**BARBERSHOP HARMONY SOCIETY**  
**SAMPLE BEQUEST LANGUAGE AND BENEFICIARY DESIGNATION INFORMATION**

**For an unrestricted gift in a will:**

I give [the sum, percentage, or description of property] to Barbershop Harmony Society, Nashville, Tennessee, to be used for its general tax-exempt purposes, but without other restriction as to use.

**For a restricted gift in a will:**

I give [the sum, percentage, or description of property] to Barbershop Harmony Society, Nashville, Tennessee, to be [used to support \_\_\_\_\_] OR [added to the \_\_\_\_\_ endowment fund] OR [used to establish or be added to an endowed fund established pursuant to my most recent Memorandum of Agreement on file with Barbershop Harmony Society].

**For an unrestricted gift in a revocable trust agreement:**

I direct my trustee to distribute [the sum, percentage, or description of property] to Barbershop Harmony Society, Nashville, Tennessee, to be used for its general tax-exempt purposes, but without other restriction as to use.

**For a restricted gift in a revocable trust agreement:**

I direct my trustee to distribute [the sum, percentage, or description of property] to Barbershop Harmony Society, Nashville, Tennessee, to be [used to support \_\_\_\_\_] OR [added to the \_\_\_\_\_ endowment fund] OR [used to establish or be added to an endowed fund established pursuant to my most recent Memorandum of Agreement on file with Barbershop Harmony Society].

(Note that if you wish to establish a named endowed fund, the latter language may be used along with a separate Memorandum of Agreement. Please contact Erik Dove, CFO/COO at [edove@barbershop.org](mailto:edove@barbershop.org) or 615-673-4133 if that's of interest to you.)

**Beneficiary Designation Information (for Retirement Accounts and Life Insurance Policies)**

One of the simplest, smartest ways to make a significant, meaningful planned gift to BHS is by including BHS as a beneficiary on your retirement accounts (IRA, 401(k), 403(b), 401(a), etc.) and life insurance policies. That can be done in the following way:

Steps

1. Log into your account online, or call the financial institution or other plan administrator.
2. Find or ask for a "beneficiary designation," "change of beneficiary," or equivalent form.

3. Complete the form, including Barbershop Harmony Society as a beneficiary to receive a percentage or all of the account proceeds, following the instructions given. (Information typically requested is included below these steps.)
4. Electronically or physically sign and date the form, as appropriate (and obtain your spouse's signature, if applicable and requested).
5. Click to submit the form online or mail the physical form to the address indicated by the financial institution or plan administrator. Look for or request a confirmation that the update has been received.
6. Please let us know you've included BHS in your plans. Although we invite and encourage donors to share an estimated amount with us so we can suggest relevant possibilities for use of your gift in a way that is most meaningful to you, sharing the amount is not required. Most importantly, we simply want to be able to thank you in an appropriate way, including as "anonymous" if requested, and to make sure your gift is realized as intended.

Our Federal Tax ID Number for beneficiary designations on retirement accounts, life insurance policies, or other purposes is 39-0926339, the correct legal name for designations is Barbershop Harmony Society, and the appropriate address is 110 7th Ave.N., Nashville, TN 37203. The main phone number is 800-876-7464.

Once your gift is in place, we ask that you fill out our [Forever In Harmony Information Form](#) and return it to Erik Dove, CFO/COO at [edove@barbershop.org](mailto:edove@barbershop.org) or 615-673-4133 to share relevant information to make sure we understand your intent and preferences.

Note: This information is provided for general illustration and educational purposes only. Barbershop Harmony Society is not providing you with any legal, tax, or financial advice. Please consult with your own independent professional advisors for advice concerning your specific circumstances.

Thank you again! We very much appreciate your generosity in supporting BHS in this special way, and look forward to welcoming you to the *Forever In Harmony* program. Please let us know if there is any other information you'd like from us, or if you, your attorney, or your financial advisor have any questions.

### **Disclaimer**

Barbershop Harmony Society provides this information as an educational service to our donors, and it is not legal, tax, or financial advice. Please consult with your own independent professional legal, tax, or financial advisors regarding your specific circumstances and how any charitable gift may affect your situation.