



Testamentary Giving

Your donor advised fund can be named as a beneficiary in your insurance policies, retirement accounts and other estate planning documents. Naming your donor advised fund in these documents is an efficient and flexible way to establish your charitable legacy, and changes to your recommended charitable beneficiaries will not require changes to your estate plan.

How to Name The Signatry as a Beneficiary

We suggest sharing the wording below with your estate planning attorney or other professional adviser when naming your fund in your estate planning documents.

Servant Foundation, d/b/a The Signatry (a Missouri nonprofit corporation subject is to its governing instruments, policies and procedures, as amended from time to time [TIN# 43-1890105]), or its successor organization, designated for The Colonial Legacy Fund Donor Advised Fund, fund ID # 12074.

If you like, you may provide The Signatry with a copy of legal documents, or you may send a letter notifying us that you have included your donor advised fund in the legal documents.

When The Signatry receives proceeds, they will be added to your fund. You or your successor 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 your estate or your surviving heirs.