

Leaving a Legacy

Remembering St. Jude in Your Will



**St. Jude Children's
Research Hospital**

ALSAC • Danny Thomas, Founder



Estate planning offers an opportunity to consider what really matters in our lives. For most of us, family comes first. But these days, many of us are fortunate enough to have additional assets after bequeathing heirlooms and taking care of our children and grandkids.

In such cases, we may search for ways to reflect the values we cherish. Our donors often tell us that they have decided that their values are best represented by a bequest to St. Jude.

This booklet describes ways a bequest can help you achieve your personal and financial goals, benefitting your family and St. Jude and leaving a legacy to carry your values forward beyond your lifetime.

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Why a Will?

Seven out of ten Americans who die each year leave no will. The result is often uncertainty, anguish, and unnecessary expense.

Without a will, your estate will be distributed according to state law, regardless of your wishes. With a will, you can make specific provisions for each of your heirs and ensure that your wishes will be carried out. With a will you can:

Share Your Good Fortune— And Your Values

Those of us blessed with abundance often express our gratitude through giving. At St. Jude we warmly welcome your support for our mission.

Leave a Legacy with Lasting Impact

A bequest to St. Jude offers a way to extend the impact of your values beyond your lifetime.



Is Your Will Up to Date?

Have you recently...

- **Changed your marital status?**
- **Welcomed a new child, grandchild, or great-grandchild?**
- **Moved to a new state of residence?**
- **Observed a change in the needs or circumstances of one of your beneficiaries?**

If you answered “YES” to any of these questions, your will is due for a review and updating.

If you have already drafted a will, it is important to review it regularly to ensure that it is up to date. When you write or update your will, we hope you will consider including a bequest to St. Jude. We have provided sample language on the following pages. Feel free to call us any time at (800)395-1087 for answers to any questions you may have.

Using the Right Words

Charitable bequests are easy to execute and offer considerable flexibility. You continue to enjoy full use of your assets during your lifetime, and no immediate donation is required.

Listed here are the most common kinds of bequests, followed by suggested language to discuss with your advisor for naming St. Jude or a loved one as a beneficiary.

Residual Bequest

You give “what’s left” after your friends and loved ones are provided for. This is a popular choice for charitable bequests because it ensures that loved ones receive their distribution before any assets are given to charity.

“I bequeath the residue of my estate, after the satisfaction of all specific bequests, to St. Jude Children’s Research Hospital, Inc., Memphis, Tennessee.”

General/Fixed-Dollar Bequest

You can designate a stated sum of money to a beneficiary. By stating a specific dollar amount, you know exactly how much money will go to your beneficiary.

“I bequeath the sum of \$_____ to St. Jude Children’s Research Hospital, Inc., Memphis, Tennessee.”

Percentage Bequest

If you would like your bequests to grow as your assets grow you may want to consider a percentage bequest. When you bequeath a specific percentage, the distributions will automatically adjust as the value of your estate changes.

“I bequeath to St. Jude Children’s Research Hospital, Inc., Memphis, Tennessee, an amount equal to _____ percent of the net value of my estate.”

Contingent Bequest

You may want to leave your entire estate to family and friends. However, if you outlive any beneficiary, a contingent bequest provides an opportunity to designate St. Jude to receive that portion of the estate.

“In the event that [name of the primary beneficiary] does not survive me, I designate St. Jude Children’s Research Hospital, Inc., Memphis, Tennessee, as the beneficiary of this bequest [type of bequest]”

If you would like to designate your gift to a specific St. Jude program or if you are interested in establishing a fund that bears your name or the names of loved ones, we would be happy to work with you to realize your goals. Please call us at (800) 395-1087.

Why St. Jude?



“Helping such families by giving to St. Jude makes us forget about ourselves and think about others.”

– Jeff and Janet Carlin



“By providing for St. Jude with a bequest of a percentage of my estate, I can provide for my siblings and the things I care about after I am gone.”

– Paul Sobolik

The Danny Thomas- St. Jude Society

When you make a legacy gift to St. Jude we welcome you to membership in the Danny Thomas-St. Jude Society, a special group of people who share a love for the children of St. Jude and who have made a generous commitment to continue their support of St. Jude beyond their lifetime.

In celebration of your commitment, you will be invited to become part of the Legacy Wall, a permanent tribute to your faithful support. The Legacy Wall is our way of honoring you for having made a commitment to the hospital through your estate plan.

That’s why we encourage you to let us know if you have included St. Jude in your estate plan. Notification of such gifts are often tinged with sadness, particularly when we have had no opportunity to say “thank you.” If we are in your plans we would like to say “thank you” and welcome you as the newest member of the Danny Thomas—St. Jude Society.

Information Request Form



Name

Address

City State Zip

- I have remembered St. Jude in my will or other long-range plan.
- I am considering remembering St. Jude in my will or other long range plan.
- Please send me information about a gift that lets me enjoy lifetime payments, tax savings and other benefits.
- Please have a staff person contact me.

Phone (Best time to call)

E-mail (to receive your information by e-mail)

Please return this form to:

Brenda Abshure
Office of Gift Planning
501 St. Jude Place
Memphis, TN 38105

or call us at (800) 395-1087 for faster service.

The information in this document does not constitute legal or financial advice. We encourage you to discuss these options with your own advisors before deciding on the best choice for you.

Getting Started

We are committed to making sure that you, as one of our most valued friends, are treated as you deserve. Please contact us and we will answer any questions that you have about legacy giving.

By phone: (800) 395-1087

By e-mail: giftplanning@stjude.org

By mail: Use the enclosed reply form and envelope and send to:

Brenda Abshure
Office of Gift Planning
501 St. Jude Place
Memphis, TN 38105

For more information, visit our website:

www.stjudelegacy.org/bequests

Thank you!





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