



Transforming Lives.
Strengthening Communities.

Legacy Gifts



To make a lasting impact in the lives of homeless families with children, consider making a planned gift to Attain Housing. Including Attain Housing in your estate plan will assist you in reaching and achieving your own philanthropic and charitable giving goals and allow Attain Housing to continue its work of transforming lives and strengthening communities by providing housing and services helping homeless families to transition to self-sufficiency.

www.AttainHousing.org

There are many charitable planned giving options available. For example, you can make a planned gift to Attain Housing by naming Attain Housing as a beneficiary of your last will and testament, living trust, life insurance policy, IRA or retirement plan.

You can also name Attain Housing as a beneficiary of a charitable trust. Your attorney or financial advisor can advise you of the various types of charitable trusts and assist you in establishing a trust that is tailored to your personal needs.

Some of the above-mentioned planned giving strategies may have a greater tax benefit to you than others, so please consult with your attorney or financial advisor on which strategy would work best for you.

For examples of specific language that you may use to name Attain Housing as a beneficiary of your will, trust, life insurance policy, retirement assets, or other contractual gift, go to our website or contact Attain Housing.

If you, your attorney or financial advisor has any questions, please do not hesitate to contact Attain Housing:

Phone: 425-576-9531 ext. 109

Email: paolan@attainhousing.org

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1. GIFTS UNDER A WILL

The following language is an example of wording that may be used to name Attain Housing as a beneficiary of your last will and testament. You may either make a general or restricted gift to Attain Housing. In addition, such gift may be of a specific dollar amount or it may also be of a percentage of your estate.

- a. GENERAL TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: I give _____ Dollars (\$ _____) to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for general purposes. (EIN 91-1481848)
- b. GENERAL TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: I give _____ percent (____%) of the rest and residue of my estate to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for general purposes. (EIN 91-1481848)
- c. RESTRICTED TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: I give _____ Dollars (\$ _____) to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for [insert donor restriction]. (EIN 91-1481848)
- d. RESTRICTED TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: I give _____ percent (____%) of the rest and residue of my estate to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for [insert donor restriction]. (EIN 91-1481848)

2. GIFTS FROM A TRUST

The following language is an example of wording that may be used in the event Attain Housing is named as a contingent beneficiary of a trust estate. Please keep in mind that such gifts may also be restricted and may be of either a specific dollar amount or a percentage of the trust estate.

- a. GENERAL TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: The trustee shall distribute _____ Dollars (\$ _____) to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for general purposes. (EIN 91-1481848)
- b. GENERAL TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: The trustee shall distribute _____ percent (____%) of the rest and residue of my estate to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for general purposes. (EIN 91-1481848)
- c. RESTRICTED TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: The trustee shall distribute _____ Dollars (\$ _____) to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for [insert donor restriction]. (EIN 91-1481848)
- d. RESTRICTED TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: The trustee shall distribute _____ percent (____%) of the rest and residue of my estate to Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest, to be used for [insert donor restriction]. (EIN 91-1481848)

3. CONTRACTUAL GIFTS

Attain Housing may be named as the beneficiary of an asset that passes outside the terms of a will or a trust (e.g. life insurance, IRA, 401(k)). In order to clarify the intention of the donor, the contractual instrument governing the asset should set forth the following as the official recipient of the gift:

Attain Housing, located at 125 State Street South, Kirkland, WA 98033, or its successors-in-interest.

4. GENERAL INFORMATION

Below please find some general information that may be beneficial to you in finalizing your estate plan.

Legal Name:	Attain Housing
Incorporation Details:	501(c)(3) organization, classified as a public charity, exempt from federal income tax Washington State non-profit corporation Tax ID # 91-1481848
Mailing Address:	Attain Housing 125 State Street South, Kirkland, WA 98033 Attention: Development Department

attain 
HOUSING
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