



Lifetime Recovery Planned Giving: Beneficiary Designation

Donors may designate Lifetime Recovery (San Antonio Lifetime Recovery) as the beneficiary of your planned giving gifts including an IRA, life insurance policy, investment account, or qualified retirement plan. Beneficiary forms are available by contacting the organization that manages your accounts or insurance policy.

The following language can be used on the beneficiary form:

**Lifetime Recovery, Inc.
96 Crossroads Blvd. | P.O. Box 5968
San Antonio, Texas 78201
Tax Identification Number: 74-1540097**

**Administrative Office
96 Crossroads Blvd.
San Antonio, TX 78201**

**Telephone: 210-734-6362 * Administrative Fax: 210-731-2916
www.lifetimerecoverytx.org**

**Residential Campus
10290 Southton Rd.
San Antonio, TX 78223**



Lifetime Recovery Planned Giving: Gift of Stock

Thank you for your interest in making a charitable gift to Lifetime Recovery in the form of a Stock Transfer. For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to Lifetime Recovery. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash.

To donate stock to Lifetime Recovery (Tax ID# 74-1540097), please note the following:

- Brokerage House: National Financial Services, LLC
- Account Name: SAN ANTONIO LIFETIME RECOVERY INC
- Financial Advisor: Rickey Franklin 210-220-4523
- Account Number: 037-291040
- DTC Number: 0226
- Reference: Donor Name (including your name will ensure the gift is properly acknowledged)

To appropriately credit you with the gift, please contact:

Diana Reyes, CFRE, VP of Development & Community Engagement at dreyes@ltrtx.org or 210-734-6362, ext. 8126 upon the completion of the transaction.

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Lifetime Recovery Planned Giving: Bequest Language for Estate Planning

Unrestricted

Restricted

Outright Bequest

An outright bequest, in which you leave Lifetime Recovery is a specified dollar amount or specified assets, such as securities, real estate or tangible property. It is considered unrestricted if the gift is intended for general support of Lifetime Recovery at the discretion of the Leadership Staff and the Board of Directors. Donors may also restrict the use of their bequests for a specific area of charitable support. This may require additional language in your estate planning documents.

Below are four options to consider when making your estate plans. The following language may be used when you create your will, trust, or add a codicil to your existing will:

“I give, devise, and bequeath to “Lifetime Recovery, Inc., 96 Crossroads Blvd., P.O. Box 5968, San Antonio, Texas 78201, Tax Identification Number: 74-1540097”.

- a. the sum of \$ _____;
- b. _____% of my estate;
- c. the following securities, real estate or tangible property _____;
- d. or, _____% of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid.

If a restricted gift, the property comprising this gift shall be used for _____ (state purpose). If the need for funds for the charitable purpose described above no longer exists at some future date, the Staff Leadership and the Board of Directors are authorized to use these funds in the best interest of Lifetime Recovery.

Printed Name

Signature

Date

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Lifetime Recovery Planned Giving: Bequests to Support Endowment Funds

Unrestricted

Restricted

Both unrestricted and restricted bequests may be designated to support Lifetime Recovery's existing endowment funds, or establish new endowed funds:

"I give, devise, and bequeath to Lifetime Recovery

- the sum of \$ _____
- _____ percent of my estate or
- the following property _____

_____ (the rest, residue, and remainder of my estate). The estate/property comprising this gift may, for investment purposes, be merged with the general investment assets of Lifetime Recovery."

The gift shall be recorded as "The _____ Fund" and shall always be so designated.

If a restricted endowment, spendable income shall be used for _____ (state purpose). The property comprising this gift may, for investment purposes, be merged with the general investment assets of Lifetime Recovery. If the need for funds for the charitable purpose described above, no longer exists at some future date, the Leadership Staff and the Board of Directors are authorized to use these funds in the best interest of Lifetime Recovery providethat the identity of the fund is maintained.

Printed Name

Signature

Date

Please contact Lifetime Recovery to assure that your planned gift will be implemented according to your wishes:

Diana Reyes, CFRE
Vice President, Development & Community Engagement
Phone (210) 734-6362, ext. 8126 or email at dreyes@ltrtx.org

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