



Advisor's Guide for Planned Giving

Gifts from Wills and Trusts

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city, and other identifying details be used. To name the John Austin Cheley Foundation (JACF) in your client's will or trust please use the following suggested language:

Residual Gift Language

A residual bequest comes to us after your client's estate expenses and specific bequests are paid:

I give, devise and bequeath to the John Austin Cheley Foundation ("JACF"), a nonprofit corporation under Colorado law with its principal business address of 1420 Ogden St. #102, Denver, CO 80218, Tax Identification Number 48-1077337, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used to further JACF's charitable mission as JACF's Board of Directors in its sole discretion may deem appropriate (or for the support for a specific fund or program).

Specific Gift Language

Naming the John Austin Cheley Foundation as a beneficiary of a specific amount from your client's estate is easy:

Specific Bequest – Unrestricted Use

I give, devise and bequeath to the John Austin Cheley Foundation ("JACF"), a nonprofit corporation under Colorado law with its principal business address of 1420 Ogden St. #102, Denver, CO 80218, Tax Identification Number 48-1077337, the [sum of (_AND XX/100 DOLLARS \$_)] OR [insert description of real property] (the "Property") to be used to further JACF's charitable mission as JACF's Board of Directors in its sole discretion may deem appropriate.

Specific Bequest – Restricted for Adopt-A-Camper Program

I give, devise and bequeath to the John Austin Cheley Foundation ("JACF"), a nonprofit corporation under Colorado law with its principal business address of 1420 Ogden St. #102, Denver, CO 80218, Tax Identification Number 48-1077337, **\$25,000** to be used to further JACF's charitable mission through the Adopt-A-Camper Program. The purpose of this fund is to provide current support, upon total funding, to send one camper to one of the Foundation's associated camps on an annual basis for five years.

Specific Bequest – Restricted for Campership Endowment Fund

I give, devise and bequeath to the John Austin Cheley Foundation ("JACF"), a nonprofit corporation under Colorado law with its principal business address of 1420 Ogden St. #102, Denver, CO 80218, Tax Identification Number 48-1077337, **\$150,000** to be used to further JACF's charitable mission through the creation of an endowment fund. The purpose of this fund is to provide current support, upon total funding, to send a camper or campers to the Foundation's associated camps in perpetuity.

Specific Bequest – Restricted Use

I give, devise and bequeath to the John Austin Cheley Foundation ("JACF"), a nonprofit corporation under Colorado law with its principal business address of 1420 Ogden St. #102, Denver, CO 80218, Tax Identification Number 48-1077337, the [sum of (_AND XX/100 DOLLARS \$_)] OR [insert description of real property] (the "Property") to be used to further JACF's charitable mission as JACF's Board of Directors in its sole discretion may deem appropriate.

This bequest may be combined with JACF's other funds for the purposes of investment and reinvestment and shall be used in support of [**state specific purpose of gift**]. If at any time in the judgment of the Board of Directors of JACF it is impractical or impossible to carry out this purpose, then the Board of Directors may use this bequest for such other purposes as shall be determined by the Board of Directors to be consistent with my interests and intentions.

Specific Gift Language

The John Austin Cheley Foundation can be named as a contingent beneficiary in your client's will or personal trust if one or more of their specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to the John Austin Cheley Foundation, ("JACF"), a nonprofit corporation under Colorado law with its principal business address of 1420 Ogden St. #102, Denver, CO 80218, Tax Identification Number 48-1077337, the sum of \$ (or all or a percentage of the residue of my estate) to be used to further JACF's charitable mission as JACF's Board of Directors in its sole discretion may deem appropriate (or for the support for a specific fund or program).

Gifts of Appreciated Securities

Please use the following instructions when transferring your client's securities to the John Austin Cheley Foundation. Deliver by DTC to:

Account Name: John Austin Cheley Foundation

Broker: Charles Schwab & Company

JOHN AUSTIN CHELEY FOUNDATION

Account Number: 4760-6054
DTC Number: 0164, Code 40
JACF Tax ID: 48-1077337

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or Any Other Plan with a Beneficiary Designation

Please have your client contact his/her plan provider for a change of beneficiary form. Once they have completed the form, please send a copy to Alyssa Street, Development Director at the John Austin Cheley Foundation at giving@cheleyfoundation.org or contact her at 720.981.2532 x100.

Legal Name: John Austin Cheley Foundation
Address: 1420 N. Ogden St. #102, Denver, CO 80218
JACF Tax ID: 48-1077337

Note to Attorneys, Accountants and Other Professional Advisors

We look forward to working with you and your client!

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason, we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into well-crafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based upon the information we provide.

Please contact Alyssa Street, Development Director, at 720.981.2532 x 100 or giving@cheleyfoundation.org if you have any questions or need any additional information.

Thank you again for your interest in JACF!