



Naming JACF as Your Beneficiary

When you opened your individual retirement account, investment account, bank account, or purchased your life insurance policy, you should have designated who will get those assets when you die. That person is known as the beneficiary.

Did you know that you can name JACF as your beneficiary?

You can either leave the entire amount of your death benefit to JACF or a portion of the assets along with a spouse, family member, or another beneficiary. When you die, the proceeds will go directly to your named beneficiaries and JACF will receive money from your retirement account tax-free.

How do I start the process?

Request a beneficiary designation form from your insurance company, bank or advisor. You might also have the option of logging into your account and updating your beneficiary information online. List JACF as the beneficiary and use the legal name, address and tax ID number provided on the righthand side of this information sheet for your reference as you fill out the form.

Don't forget to let us know! We would love to add you to our Summit Society and thank you for your future gift to JACF and our campers. Reach out to us by phone 720.981.2532 x 100 or by email at giving@cheleyfoundation.org and we will keep this information on file.

Sign and date the beneficiary designation form before returning it to the address the insurance company or retirement plan administrator provides. Your beneficiary designation will not be effective until the financial institution receives your signed form.

Important Note: *If you name one person as a beneficiary on an account/IRA/insurance policy and someone else in your will, the beneficiary on the account takes priority over the will. Be sure to keep your beneficiaries updated.*

HOW YOU BENEFIT

1. You retain control over your assets during your lifetime or until you decide you want to complete your gift.
2. Your gift can be structured to benefit the John Austin Cheley Foundation after you die or after both you and your spouse have died.
3. You can always update your beneficiary designation form if life circumstances change.

HOW JACF BENEFITS

After your death, JACF will be able to use your gift, either as an addition to the endowment or for a purpose you specify.

IMPORTANT

Legal Name:

John Austin Cheley Foundation

Tax ID:

48-1077337

Address:

1420 N. Ogden St. #102
Denver, CO 80218

Telephone:

720.981.2532 x 100