

Educational Reference Sheet

Leaving Your Legacy for OLLI

Thank you for exploring how you can safeguard the future of our OLLI program. By aligning your estate plans with your personal values, you help guarantee that future generations will always have a vibrant, affordable space for intellectual growth and community connection.

Beneficiary Designations

You do not need to rewrite your will to make a meaningful impact. You can name OLLI as a beneficiary of a specific percentage (e.g., 1%, 5%, or 10%) of your existing accounts. This takes less than 15 minutes, costs nothing, and avoids legal fees.

- **TRADITIONAL.IRAs.™.067(k)s:** Leaving these to heirs can trigger significant income taxes (often requiring total withdrawal within 10 years). Nonprofits receive them 100% tax-free.
- **BANK.ACCOUNTS:** Ask your bank for a Payable-on-Death (POD) or Transfer-on-Death (TOD) form.
- **LIFE.INSURANCE:** Allocate a portion of an active or fully paid policy.

Sample Language for Your Will or Trust

If you choose to update your formal estate documents, your estate planner can easily add an amendment (codicil) using the following baseline language:

FOR.A.SPECIFIC.AMOUNT;

"I give, devise, and bequeath the sum of \$_____ [or describe a specific asset] to the University of North Texas Foundation, a nonprofit organization located in Denton, Texas, to be used strictly for the benefit of the Osher Lifelong Learning Institute (OLLI) program."

FOR.A.PERCENTAGE.OF.THE.REMAINING.ESTATE.(RESIDUAL.GIFT);

"I give, devise, and bequeath _____% of the residue of my estate to the University of North Texas Foundation, a nonprofit organization located in Denton, Texas, to be used strictly for the benefit of the Osher Lifelong Learning Institute (OLLI) program."



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Essential Organization Details for Your Records

To make sure your gift is securely and accurately directed, your financial advisor or attorney will need the following exact corporate information:

- Official.Legal.Name: University of North Texas Foundation, Inc.
- Program.Designation: Osher Lifelong Learning Institute (OLLI)
- Mailing.Address: UNT Foundation, 1155 Union Circle #311250, Denton, TX 76203-5017
- Federal.Tax.ID.(EIN): 23-7232618

Local Contacts & Low-Pressure Next Steps

- Start.a.Conversation: Talk with your family about your favorite OLLI classes and why preserving this space matters to you.
- Take.This.Sheet.to.Your.Advisor: Share this educational layout with your financial advisor or estate attorney to see how a tax-smart asset transfer fits your planning goals.
- Reach.Out.for.Personal.Support: If you have questions about structuring a gift or want to let us know you have included OLLI in your plans, please contact our team directly:

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