



Michael J. Karloff '81

Associate Vice President - Trusts, Estates & Planned Giving
Hastings College Foundation

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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 Hastings College Foundation in a will or trust please use the following suggested language:

Bequest Language

"I, [name], of [city, state, ZIP], give, devise and bequeath to Hastings College Foundation [written amount or percentage of the estate or description of property] for its unrestricted use and purpose."

Gifts of Appreciated Securities:

Legal Name: Hastings College Foundation

Tax I.D. Number: 51-0247972

DTC Number: 0015

Account #: 361-047900-617

Incorporated in: Hastings, NE

Please contact us for a stock transfer form.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Michael J. Karloff '81, Associate Vice President - Trusts, Estates & Planned Giving.

For Gifts of Securities, please contact the Office of Gift Planning for transfer instructions.

Note to Attorneys, Accountants and other Professional Advisors

Thank you for helping your client with their charitable planning. The Office of Gift Planning is available to discuss with you or your client, their charitable intentions to help ensure the gift makes the desired impact. If you need information or if you have any questions or concerns, please contact Michael J. Karloff '81, at 402.461.7473, 402.960.8016, or mkarloff@hastings.edu.

