



Including Jefferson Center in Your Will

Your Will is one of the most important documents you will ever sign. It provides for the disposition of all of the property accumulated during your lifetime. It contributes to the financial security of your beneficiaries, benefits causes you believe important, and memorializes your life.

A Codicil to modify an existing Will

If you already have a will, a codicil presents an easy way for Jefferson High School alumni, family and friends to include Jefferson Center in their estate plans. It's not necessary to go through the time and expense of redoing the entire will; all it takes is the creation of a brief legal document that is then stored in a safe place with the will.

***Below is a sample codicil to a properly executed will.
This information is provided for education purposes only. All donors should consult with and rely exclusively on their own attorneys or other financial advisors for tax and legal advice.***

CODICIL TO WILL OF _____ I, _____,
Print Name Sign Name

residing and domiciled in the City/County of _____ and State

of _____, being of sound and disposing mind and memory do hereby make, ordain, publish and declare this addendum /codicil to my last will and testament.

Unrestricted Bequest

I hereby give, devise, and bequeath to Jefferson Center Foundation, LTD. IRS ID # 62-1392982, located at 541 Luck Ave SW, Roanoke, Virginia 24016, _____ % of the residue of my estate, (or) the sum of \$ _____, to be used for the maintenance and preservation of Jefferson Center.

The above and foregoing instrument was this _____ day of _____ (month), 20____ year), signed, and declared by said _____ (name), testator, as an addendum to his/her Last Will and Testament, in the presence of us, who at his/her request, and in his/her presence, and in the presence of each other, have subscribed our names as witnesses.

Witness's Name Address, City, State Date

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You are invited to notify Jefferson Center if you prepare a codicil so that you can be recognized as a member of Jefferson Center's Legacy Society. Notification form attached.



Jefferson Center Legacy Society Notification Form

- ☐ I have included a bequest to Jefferson Center in my will or living trust
- ☐ I have named Jefferson Center as a beneficiary of one of the following:
 - ☐ An outside trust arrangement
 - ☐ A retirement account
 - ☐ A life insurance policy
 - ☐ Other

Please provide the following information:

Name: _____

Address: _____

City, State Zip: _____

Email: _____

Phone: _____

I give permission to Jefferson Center to list me/us as members of the Jefferson Society Legacy Society.

Name(s) as they should appear in donor listings

_____ **This gift intention is anonymous.**

_____ **is my estimate of the current value of my planned gift.** (Please note this information is not required to be recognized as a member of the Legacy Society. Should you choose to provide this information, the amount will remain confidential and will not be included in public reports.)

- ☐ I am interested in learning more about Jefferson Center's Legacy Society and how my planned gift can impact future generations.
- ☐ I am interested in a naming opportunity for my legacy gift and would like more information.

Signature

Date