**Steps to Naming a Charity Beneficiary**

1. Identify the charity or cause you want to support.
2. Determine what type of gift you’d like to make.
3. Include the gift in your Estate Plan

**1. Identify the Charity or Cause You Want to Support**

Make sure to get the organization's full legal name (which often may vary from their commonly used names), and an Employer Identification Number (EIN) or Taxpayer Identification Number (TIN).

**2. Determine What Type of Gift You’d Like to Make**

* A defined dollar amount
* Specific assets (like cars or stocks)
* A percentage of your total estate

If you're giving a very large gift ($10,000 or more), or if you're giving specific assets (like a car or real estate), it’s a good idea to contact the charity first. This will help ensure the process is seamless and head off any unexpected complications (like the charity not being able to accept the real estate you would like to donate).

**3. Include Your Gift in Your Estate Plan**

[Wills and Living Trusts](https://trustandwill.com/learn/what-is-a-living-trust-vs-will) commonly include charitable donations that will go into effect upon your passing.

**Why You Should Inform a Charity Beneficiary of Your Wishes**

While it’s not required to inform an organization of a Charitable Bequest, it’s still a good idea to do so. Charities *love* to hear from planned donors. More often than not, while they’re thrilled to receive a donation from a decedent, they generally regret not having met the donor beforehand so they can build a connection and express their gratitude.

**Considerations for Large Bequests to Charity**

If you’re planning on leaving a large gift (over $100,000), or if you plan to donate complex assets like real estate, you should definitely contact the charity first. Some charities might need time to prepare for these gifts.

**Consulting the experts**

Planned-giving experts can help you craft strategies for nearly any goal. For example, you may have stock you’d like to donate to a charity, but maybe you’re relying on the dividends from that stock to cover your current living expenses. Planned-giving advisors can help create a strategy that may allow you to donate the stock now, while taking an immediate income tax deduction and still receiving a stream of income from the stock for the rest of your life. There are some very powerful strategies that are often overlooked by donors.

Some people hesitate to contact a charity because they don’t want to draw any attention to themselves, or maybe because they are hesitant to commit to a donation now in fear of something changing in the future. But the truth is, charities understand that situations change, and they would also understand if a large donation became substantially less over time for any number of reasons.

Working with the charity can make those changes easier by ensuring your gift planning is appropriate at all stages of life.