



THE  
**THOMAS & MARY  
OWENS**  
LEGACY SOCIETY

## **Make Cara Collective a part of your personal legacy with a charitable gift from your estate.**

### **Gifts from Wills and Trusts**

When making a charitable gift to a nonprofit organization, it is vital that the charity's legal name, address, and other identifying details be used. To name Cara Collective in your will or trust, please use the following sample language:

Sample Bequest Language:

"I hereby give, devise and bequeath to The Cara Program DBA Cara Chicago, or its successors in interest, with offices in Chicago, IL, federal tax ID 36-4268095, the sum of \$X (amount written out), exclusive of my lifetime donations, if any, to be used for Cara Chicago's most urgent priorities as determined by its board of directors in their sole discretion."

### **Gifts from IRA, Retirement Plans, or Life Insurance**

When naming Cara Collective as a beneficiary or partial beneficiary of your retirement plan or life insurance, follow the below steps:

1. Request a "change of beneficiary" form from your plan administrator.
2. List The Cara Program DBA Cara Chicago as beneficiary at the following address:  
The Cara Program DBA Cara Chicago  
237 S Desplaines  
Chicago, IL 60661  
EIN #: 36-4268095
3. Submit form to your plan administrator.

**Questions? Please contact Sharla K. Nolte at [snolte@carachicago.org](mailto:snolte@carachicago.org), 312.628.5940**



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### **Gifts from Securities**

When you are directing your broker to transfer shares to Cara Collective, provide the following information in your request:

The Cara Program DBA Cara Chicago  
237 S Desplaines  
Chicago, IL 60661  
EIN #: 36-4268095

Broker Name: Chicago Capital  
Account Name: Cara Chicago  
Account: #676881067

DTC Number: 0226

Contact with questions: Malinda Distefano, 312-364-5212 or Whitney Nessner, 312-429-2336

### **Gifts from Bank Accounts, CDs, and Donor Advised Funds**

When naming Cara Collective as a Payable-On-Death (POD) beneficiary of an account, follow the below steps:

1. Request a "change of beneficiary" form from your financial institution.
2. List The Cara Program DBA Cara Chicago as POD beneficiary at the following address:  
The Cara Program DBA Cara Chicago  
237 S Desplaines  
Chicago, IL 60661  
EIN #: 36-4268095
3. Submit form to your financial institution.

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### **Gift of Real Estate**

When making a charitable gift of real estate, please use the following language, depending on your individual circumstances.

#### Specific Bequest (Will/Trust):

This language designates a specific piece of real estate to the charity.

“Example: I hereby give, devise and bequeath to The Cara Program DBA Cara Chicago, with offices in Chicago, IL, federal tax ID 36-4268095, the real property described as: [Detailed Property Description]. I direct my Executor/Personal Representative to sell the property and distribute the proceeds to The Cara Program DBA Cara Chicago for its general purposes.”

#### Residuary Bequest (Will/Trust):

This language transfers whatever remains of your estate after all other bequests and expenses are addressed, including the real estate.

Example: “I give, devise, and bequeath all the rest, residue, and remainder of my estate, including any real property not otherwise disposed of, to The Cara Program DBA Cara Chicago, with offices in Chicago, IL, federal tax ID 36-4268095 for its general purposes.”

*DISCLAIMER: This document is informational and educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.*

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