

BRIDGE BUILDER SOCIETY **PAYABLE OR TRANSFER** ON DEATH ACCOUNTS

WHAT IS A PAYABLE ON DEATH (POD) OR TRANSFER ON DEATH (TOD) ACCOUNT?

POD and TOD designations allow you to name Child Bridge as a beneficiary of your:

- Bank Accounts (POD)
- Investment or Brokerage Accounts (TOD)
- Retirement Accounts (IRA, 401(k), etc.)

These gifts are not part of your will, avoid probate, and are easy to set up or update at any time.

BENEFITS OF POD AND TOD GIFTS

- Simple to arrange – no attorney required
- No cost to make or change the designation
- Retain control of your assets during your lifetime
- Bypass probate for a smoother, faster transfer
- Keep your gift private and flexible
- Support the mission of Child Bridge with a lasting impact

Your gift ensures children in crisis will find loving, stable homes – even beyond your lifetime.

SIMPLE STEPS TO MAKE A POD/TOD GIFT

1. Contact your bank, broker, or retirement account manager.

- Ask for a POD or TOD designation form.

2. Name Child Bridge as a beneficiary.

- Use our legal name: Child Bridge, Inc.
Tax ID: 27-3382066
Address: P.O. Box 310, Big Fork, MT 59911

3. Decide what percentage or amount to leave.

- You can name multiple beneficiaries if desired.

4. Let us know.

- While not required, sharing your plans help us honor your legacy and welcome you into the Bridge Builder Society.

JOIN THE BRIDGE BUILDER SOCIETY

When you include Child Bridge in your estate plan, you are warmly welcomed into the Bridge Builder Society – a community of visionary supporters committed to lasting change.

AS A MEMBER, YOU'LL RECEIVE:

- **Welcome Packet**
Including a personalized certificate, letter, and mission materials.
- **Quarterly Impact Updates**
Stories that show the difference your legacy is making.
- **Personalized Year-End Recognition**
A personal note with a recap of your giving impact.
- **Special Invitations**
To appreciation gatherings or special events.
- **Ongoing Legacy Care**
We steward your intent with care-even after your gift is fulfilled.



Let's Talk About Your Legacy

We're here to help you take the next step with clarity and care.

Scan the QR Code or go to calendly.com/rbrooks-childbridge to book a meeting or learn more.