Leave a legacy of grace.

A simple guide to including Gracebased in your will, your trust, or the beneficiary plans you already have.

The best stories outlive the people who start them.

For 43 years, Gracebased has helped parents raise kids who are secure, significant, and strong. Not by getting everything right, but by leaning on God's grace when they don't. Along the way, hundreds of thousands of families across the world have been transformed by a better way to do home.

A legacy gift is how that work keeps going long after today's parents become tomorrow's grandparents. It's a gift you plan now and give later, through your will, your trust, or a beneficiary form, so the next generation of moms and dads finds what so many families have already found here.



Nothing out of pocket today

Your gift comes from your estate later, so your savings stay yours for as long as you need them.

Change it anytime

Life shifts. A bequest or beneficiary choice can be updated whenever your plans or your family's needs do.

Potential tax benefits

Charitable gifts may reduce estate taxes and can spare your heirs income tax on some assets.

OPTION ONE

Through your will or trust

A gift in your will or living trust is called a bequest. It's the most common legacy gift, and there's more than one way to shape it.

A specific amount

A set dollar figure or a particular asset, such as real estate or shares of stock.

A percentage

A share of your estate, so your gift grows or shrinks with it and your family stays in proportion.

What remains

Called a residual gift: all or part of what's left after your loved ones and other gifts are provided for.

A backup plan

Called a contingent gift: Gracebased receives it only if your primary beneficiaries don't survive you.

Getting started is simpler than you think

1

Decide what kind of gift fits your family and your plans.

2

Share page 5 with your attorney. It has everything needed to name Gracebased correctly.

3

Let us know, so we can say thank you and make sure your wishes are honored.

OPTION TWO

With a beneficiary form, no attorney required

Some assets pass outside your will, directly to whoever you name on file. Adding Gracebased takes one form from your account provider, often completed online in minutes.

Retirement accounts	IRAs, 401(k)s and 403(b)s. Name Gracebased as a full, partial, or contingent beneficiary.
Life insurance	Including a policy you no longer need for its original purpose, like one bought while your kids were young.
Bank and investment accounts	Checking, savings, CDs, and brokerage accounts with a payable-on-death (POD) or transfer-on-death (TOD) designation.

A smart tip for retirement accounts

When heirs inherit a traditional IRA or 401(k), they generally owe income tax on what they withdraw. A charity like Gracebased doesn't. Many families leave retirement assets to ministry and other assets to loved ones, so more of everything goes where it's meant to.

Where your gift goes

Every legacy gift supports Gracebased's general fund, so it can meet the needs of families in whatever season the ministry is in when your gift arrives. For that reason, we aren't able to accept gifts restricted to a specific program. If part of our work is especially close to your heart, we'd still love to hear about it.

Everything needed to name us correctly

Please use our full legal name and tax ID so your gift reaches us without delay.

Legal name	Family Matters, Inc.
Doing business as	Gracebased; Grace Based Families
Federal Tax ID (EIN)	86-0439625
State of incorporation	Arizona
Mailing address	4022 E. Greenway Rd., Ste. 11, #192, Phoenix, AZ 85032

SAMPLE LANGUAGE

Specific amount or percentage

"I give to Family Matters, Inc., dba Gracebased, an Arizona nonprofit corporation, Federal Tax ID 86-0439625, located at 4022 E. Greenway Rd., Ste. 11, #192, Phoenix, AZ 85032, [the sum of $_____ / ____ % of my estate], to be used for its general charitable purposes."

Residual

"I give to Family Matters, Inc., dba Gracebased (Federal Tax ID 86-0439625), [all / ____ %] of the rest, residue, and remainder of my estate, to be used for its general charitable purposes."

Contingent

"If [beneficiary's name] does not survive me, I give [the share they would have received / ____ % of my estate] to Family Matters, Inc., dba Gracebased (Federal Tax ID 86-0439625), to be used for its general charitable purposes."

On a beneficiary form, write: Family Matters, Inc. dba Gracebased · EIN 86-0439625

Already included us? We'd love to say thank you.

Telling us helps make sure your wishes are recorded correctly, and it lets us thank you while we can. Sharing your plans isn't binding, and we're glad to keep your gift anonymous if you prefer.

Name _____ Phone _____

Address _____ Email _____

- [ ] I have included Gracebased in my will or trust.
- [ ] I have named Gracebased as a beneficiary of an account or policy.
- [ ] I'm considering a legacy gift and would like to talk.
- [ ] Please keep my gift anonymous.

Approximate value of gift (optional) _____

Return to Gracebased, 4022 E. Greenway Rd., Ste. 11, #192, Phoenix, AZ 85032, or email a photo of this page to cody@gracebased.com.

Questions? We're glad to help.

Gracebased

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