



# SARAH'S HOUSE

---

## Planned Giving



### How You Benefit

- **Your gift costs you nothing now.** You retain control of your assets during your lifetime.
- **You can change your mind and modify your gift if circumstances change,** simply by requesting a new form.
- **Your gift may allow you to save on taxes** or reduce the tax burden for your heirs.
- **Your gift can remain anonymous,** if you choose. You will be remembered as someone who truly cares about your community.

### How It Works

You don't even need a will to leave a gift by beneficiary designation. Simply name "Sarah's House, A place for New Beginnings" as a beneficiary, or partial beneficiary, of any account such as:

- **Retirement Account** - Leaving a gift to Sarah's House through your retirement plan account (such as an IRA) is one of the most tax-wise gifts you can make. Most retirement plans are taxed differently than other funds. By leaving those gifts to Sarah's House and other less tax-burdened assets to your family, you can do more for your loved ones.
- **Certificates of Deposit, Bank and Brokerage Accounts, and Life Insurance Policies** - Consider naming Sarah's House as the beneficiary of a certificate of deposit, other bank or brokerage account, or a life insurance policy you no longer need.
- **Donor-Advised Funds** - You can name Sarah's House as the beneficiary of donations remaining in your donor-advised fund after your lifetime.
- **You can leave a gift in honor or memory of someone** you desire to honor.

## Three Simple Steps

Just follow these simple steps to complete your gift by beneficiary designation:

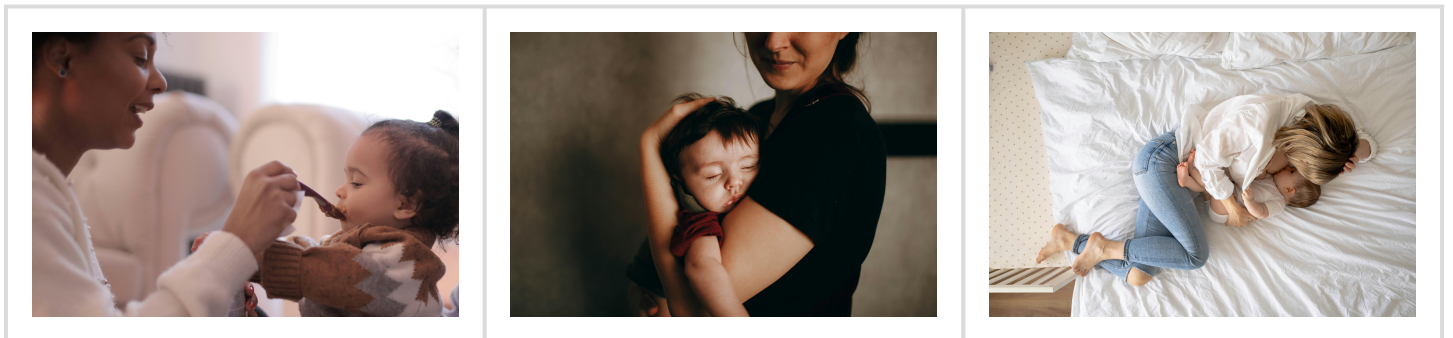
**STEP 1: CONTACT** your retirement plan administrator, bank, broker or insurance company and request a beneficiary form. **This form - not your will - determines how these assets are distributed.**

**STEP 2: WRITE** in "Sarah's House, A Place for New Beginnings" as beneficiary, or partial beneficiary, using our federal tax identification number : 99-2342604 and current business address: Sarah's House, 203 Colina Cove, Kingsland, TX 78639. If the form asks for a date of birth, use our date of incorporation: April 2, 2024.

**STEP 3: SIGN THE FORM AND RETURN** it to your plan administrator. Keep a copy for your records.

## Please Tell Us About Your Gift

Some people leave a legacy gift to Sarah's House without telling us, but we would welcome the change to say thank you. Your gift can inspire others to make a similar gift to help future residents of Sarah's House. To notify us of a legacy gift you have planned, or to discuss the best gift option for you, please contact Sara Steffan at (806) 773-8860 directly or email to [sarahshouseburnet@gmail.com](mailto:sarahshouseburnet@gmail.com).



This content found on this site is general in nature and intended to be used for informational purposes only. It should not be relied upon as legal, tax, accounting or other professional advice. To determine how a gift or estate planning decision might affect your particular circumstances, it is expressly recommended that you consult an attorney, financial advisor or other qualified professional.



Sarah's House  
Burnet, TX 78611  
[sarahshouseburnet@gmail.com](mailto:sarahshouseburnet@gmail.com)