



Beneficiary Designations

Make a Gift in 3 Easy Steps

Not everyone wants to commit to making a gift in their wills or estates. Some prefer the increased flexibility that a beneficiary designation provides by using:

- IRAs and retirement plans
- Life insurance policies
- Commercial annuities

It only takes three simple steps to make this type of gift. Here's how to name the William Daniel Mills Theatre as a beneficiary:

1. Contact your retirement plan administrator, insurance company, bank or financial institution for a change-of-beneficiary form.
2. Decide what percentage (1 to 100) you would like us to receive and name us, along with the percentage you chose, on the beneficiary form.
3. Return the completed beneficiary form to your plan administrator, insurance company, bank or financial institution.

An Example of How It Works

Eric and Monica treasure the financial help they've been able to give their children and the WDM Theatre over the years. The couple recently updated their will to leave stocks and real estate to their kids. They left the WDM Theatre a \$75,000 IRA to be transferred following their lifetime. Because the WDM Theatre is tax-exempt, all \$75,000 will help support our mission.

Next Steps

1. Contact us at info@wdtmtheatre.org for additional information or to discuss the variety of giving options.
2. Seek the advice of your financial or legal advisor.
3. If you include in WDM Theatre in your plans use our legal name and federal tax ID

Legal Name: William Daniel Mills Corporation

Address: 13506 Summerport Pkwy Ste 331, Windermere, FL 34786

Federal Tax ID Number: 92-0372198



If Eric and Monica had left the IRA to their children, approximately \$18,000* would have gone to pay federal income taxes-leaving only \$57,000 for their family's use. Eric and Monica are happy knowing they are making the most of their hard-earned money thanks to their updated estate plan.

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