Planning Your Legacy at I-House

When you include a gift to International House in your will or other estate plan, you establish a living legacy and help provide a solid financial foundation for I-House. Your investment in the future of I-House and in our residents will help our organization continue to foster intercultural respect and understanding, lifelong friendships, and leadership skills for a more just and peaceful world.

There are many ways to make a legacy gift, including:

- A specific dollar amount through a bequest in your will or living trust;
- The remainder or a percentage of your estate, after taking care of your loved ones;
- Assets held in accounts, such as Individual Retirement Accounts (IRAs), 401(k) accounts, insurance policies, pension plans, or annuities.

For gifts of real estate or personal property, please contact us regarding our acceptance policies.

Wills and Trusts

One of the most common ways to plan a gift is by including it in your will or living trust. The following is sample text that might be helpful for your tax advisor or attorney when planning your bequest:

"I bequeath ______ percent of my estate OR $______ (exact monetary value) to International House at UC Berkeley. International House is a nonprofit corporation, organized and existing under the laws of California with the principal business address of 2299 Piedmont Avenue, Berkeley, CA 94720. Tax identification number: 94-1167403.

My gift shall be (please specify):

- *Unrestricted – to be used where the need is greatest; or*
- *Restricted – to be used to support (please indicate scholarships, building preservation/improvements, or intercultural programs)."*

Name International House as a Beneficiary in Three Easy Steps

Assigning International House as an account beneficiary is another easy way to plan your gift. Your retirement accounts, pension plans, investment accounts, donor advised funds, paid life insurance policies, or commercial annuities are options. To designate I-House as your beneficiary, simply:

1. Contact the institution holding your assets and request a beneficiary form (also referred to as a designation form). This can typically be found on the institution's website.
2. Indicate our organization as a beneficiary with the following information:
   International House at UC Berkeley, 2299 Piedmont Avenue, Berkeley, CA 94720.
   Tax ID: 94-1167403.
3. Return the completed form to your plan administrator, insurance company, or financial institution and send a copy to I-House.

Life-Income Gifts
If you would like to establish a life income gift (including Charitable Gift Annuities, Charitable Remainder Trusts, and other creative and flexible gifts) to benefit you, your loved ones, and I-House, you may work with us and our colleagues in the UC Berkeley Office of Gift Planning. Please contact the Office of Gift Planning at 800-200-0575 or ogp@berkeley.edu or visit planyourlegacy.berkeley.edu/gift-types to learn more.

Please Let Us Know Your Plans
Letting us know you've taken the generous step of remembering I-House in your plans is always up to you, but we'd love to be able to show our gratitude and keep you updated on what's happening here "under the dome." By sharing your information, you will be in essence making a second gift, since your example can influence others to make similar commitments.

If you have any questions, we are here to help! Please contact us at +1 510-642-4128 or by email at philanthropy@ihouseberkeley.org.

Please be advised that I-House board members, staff, consultants, and volunteers gratefully encourage gifts to I-House, but cannot give specific tax or legal advice. We encourage you to consult your own tax and legal advisors with respect to any gifts you make.