

3 Steps To Making A Beneficiary Gift

Did you know that the beneficiaries named on a retirement plan or life insurance policy determine who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your estate?

If you are considering including a gift for Xavier in your will, we have a simple solution. Name Xavier as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

It's Easy As 1, 2, 3!

1

Request a “change of beneficiary” form from your plan administrator.

2

List Xavier as beneficiary at the following address:
30 W. 16th Street
New York, NY 10011

3

Inform us of your intentions so we can thank you!