Leaving a Legacy
Bequest Giving to St. Jude

Rachel, at age 3
acute lymphoblastic leukemia
Leaving a Legacy

Estate planning offers an opportunity to consider what is truly important in your life. For many, family comes first. But these days, you may be fortunate enough to have additional assets after providing for your loved ones. For some, the children of St. Jude have become like children of your own.

When considering your legacy, you may search for ways to continue the values you cherish, beyond your lifetime. Our supporters often tell us that their values are best represented by a gift to St. Jude Children’s Research Hospital®. By confirming a legacy gift, these important friends become members of the exclusive Danny Thomas – St. Jude Society.

This booklet describes ways a bequest can help you achieve your personal and financial goals, benefiting your family and the children of St. Jude while leaving a legacy to carry your values forward for future generations.

The information in this document does not constitute legal or financial advice. We encourage you to discuss these options with your own advisors before deciding on the best choice for you.
Estevan, at age 4

acute lymphoblastic leukemia
The Danny Thomas – St. Jude Society is an exclusive group of people who share a love for the children of St. Jude. Members are united in their passion for our mission of finding cures and saving children’s lives. Together we are working hard to reach the day that our founder, Danny Thomas, envisioned—the day when no child will die in the dawn of life.

When you include St. Jude in your will, you are eligible to become a member of the Danny Thomas – St. Jude Society. **We encourage you to please notify us of your estate plans, so we can thank you for your generous legacy gift and welcome you into the society.**

In celebration of your commitment, you will be invited to be honored with a personalized plaque on our Legacy Wall located in the hospital. The Legacy Wall is our way of honoring you for your dedication to the children through your estate plans and a lasting tribute to your faithful support. You can also keep your plans in total confidence, if you prefer.
Why a Will?

More than half of all Americans leave no will when they die. Without a will, your estate will be distributed according to state law, regardless of your wishes. With a will, you can make specific provisions for each of your heirs and ensure that your wishes will be carried out.

With a will, you can:

• **Share Your Good Fortune and Share Your Values**
  Many people who feel blessed with abundance often express gratitude through giving. At St. Jude, we warmly welcome your support of our mission.

• **Have Peace of Mind**
  Leaving a bequest to St. Jude is simple to do and ensures that your wishes will be honored after your lifetime.

Dahlia, at age 2
anaplastic meningioma

Jerry, at age 3
acute lymphoblastic leukemia
Is Your Will Up-to-Date?

If you have already drafted a will, it is important to review it regularly to ensure that it is up-to-date. Have you recently:

- Experienced a change in your marital status?
- Welcomed a new child, grandchild or great-grandchild?
- Moved to a different state?
- Seen a change in the circumstances or needs of your beneficiaries?

If you answered YES to any of these questions, it is time to review and update your will.

When you write or update your will, we hope you will consider including a bequest to St. Jude. We have provided sample language on the following pages. If you have any questions, please do not hesitate to call us at 1-800-395-1087.

Apollos, at age 1 glioblastoma multiforme  
Carly, at age 3 neuroblastoma
Using the Right Language

It is easy to leave St. Jude in your will, and there are a number of ways you can do this.

Listed here are the most common types of bequests with an explanation and suggested language to discuss with your financial advisor, accountant or attorney for naming St. Jude as a beneficiary. Please note that the correct address for St. Jude is:

St. Jude Children’s Research Hospital
501 St. Jude Place
Memphis, TN 38105

**Residuary Bequest** means that you give what is left of your estate to charity, after your loved ones are provided for. This can be the entire remainder of the estate or a portion of the remainder.

*All the rest, residue and remainder of my estate for federal tax purposes I give to St. Jude Children’s Research Hospital, Inc., located in Memphis, Tennessee, Tax ID 62-0646012, for its general purposes.*

“If there was only one charity we could give to, it would be St. Jude. There is so much good that is being done by this hospital.”

— Ann Volpe, Member, Danny Thomas – St. Jude Society
**Percentage Bequest** means that you designate a percentage of your estate to charity. This enables your bequest to change as the value of your assets change.

*I give to St. Jude Children’s Research Hospital, Inc., located in Memphis, Tennessee, Tax ID 62-0646012, ____ percent of my estate, for federal tax purposes, for St. Jude’s general purposes.*

**General or Fixed-Dollar Bequest** means you designate a sum of money to charity. By stating a specific dollar amount, you know exactly how much money will go to St. Jude. This can be given in combination with a residual bequest.

*I give to St. Jude Children’s Research Hospital, Inc., located in Memphis, Tennessee, Tax ID 62-0646012, the sum of $____, for its general purposes.*

**Contingent Bequest** means the bequest is only met if your primary intention cannot be fulfilled.

*If [name of beneficiary] does not survive me, then I give to St. Jude Children’s Research Hospital, located in Memphis, Tennessee, Tax ID 62-0646012, the rest, residue and remainder of my estate.*

If you would like to designate your legacy gift to a specific St. Jude program, or if you are interested in establishing a fund that bears your name or the name of a loved one, we would be happy to work with you to realize your goals. **Please call us at 1-800-395-1087.**
Another meaningful way to make a legacy gift to St. Jude is by designating St. Jude as the beneficiary of your life insurance policy, bank or investment accounts or retirement accounts.

**Gifts of Life Insurance**
You can request a “change of beneficiary” form from your life insurance company and make St. Jude Children’s Research Hospital, Inc., a full, partial or contingent beneficiary. A gift of life insurance in this way allows you the flexibility to change your mind at any time should your circumstances change.

**Gifts of Bank Accounts, Investment Accounts or CDs**
You can make St. Jude Children’s Research Hospital, Inc., the “payable on death” beneficiary of a bank account (savings or checking), brokerage account or certificate of deposit (CD) in most instances. Your financial institution can assist you with this easy process.

**Gifts of Savings Bonds**
You can make a provision in your will naming St. Jude Children’s Research Hospital, Inc., as the beneficiary of a savings bond, and avoid certain taxes.
“We don’t personally know any child suffering with cancer. We don’t know anyone who has a child with cancer. What we do know is this: All of us need something to believe in—a cause to support. And we truly believe there is no finer cause than St. Jude Children’s Research Hospital.”

— Marilyn & Joe Swing, Members, Danny Thomas – St. Jude Society

If you would like more information about any of these options, please call us at 1-800-395-1087.
We are committed to providing excellent service to our friends and supporters. Please contact us with any questions you have about legacy giving, and we will answer your call or respond promptly.

By phone: 1-800-395-1087

By email: giftplanning@stjude.org

By mail: Remove the form from the back of this booklet, fill it out, and mail to:

Sue Harpole
Office of Gift Planning
501 St. Jude Place
Memphis, TN 38105

For more information, visit our site: stjudelegacy.org

Dr. Aimee Talleur & St. Jude patient Izarah, at age 4, acute lymphoblastic leukemia
About St. Jude

St. Jude Children’s Research Hospital is leading the way the world understands, treats and defeats childhood cancer and other deadly diseases. We’re the place where doctors send their toughest cases, because St. Jude has the world’s best survival rates for the most aggressive forms of childhood cancers. We create more clinical trials for cancer than any other children’s hospital and turn laboratory discoveries into lifesaving treatments that benefit patients — every day. St. Jude freely shares the discoveries we make, and every child saved at St. Jude means doctors and scientists can use that knowledge to save thousands more children around the world. Unlike any other hospital, the majority of funding for St. Jude comes from public contributions. Thanks to generous donors, families never receive a bill from St. Jude for treatment, travel, housing and food, because all a family should worry about is helping their child beat these deadly diseases.
Josiah, at age 7
to acute lymphoblastic leukemia
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