



ISLAND  
HOUSING  
TRUST

PO Box 851  
Mount Desert, ME 04660  
207-244-8011

If you would like to make a gift to us via your estate or through your retirement plan, please let your attorney who has prepared your last will and testament or your retirement advisor know. You can use the form below for appropriate language. We hope you will let us know so we can thank you and welcome you to the Covenant Society, but it is not necessary. Thank you for your future gift to us—we greatly appreciate it!

A specific bequest:

“I/We \_\_\_\_\_ devise and bequeath to Island Housing Trust, a nonprofit corporation with the EIN # 22-2993615, the sum of \$ \_\_\_\_\_ (or, \_\_\_\_\_% of my estate) to be used to support the charitable activities of the Island Housing Trust to create workforce housing opportunities on Mount Desert Island.”

A residuary bequest:

“I/We \_\_\_\_\_ devise and bequeath to Island Housing Trust, a nonprofit corporation with the EIN # 22-2993615, all (or specify \_\_\_\_\_%) of the rest, residue, and remainder of my estate to be used to support the charitable activities of the Island Housing Trust to create workforce housing opportunities on Mount Desert Island.”

#### Retirement Plan Assets

Do you have a deductible IRA or retirement account funded with pre-tax income, such as a 401k and 403b? Do you own a whole life insurance policy? Because of the estate and income taxes imposed on unused portions of your retirement plans after your lifetime, you may want to make a charitable contribution of those assets. Simply name Island Housing Trust as the beneficiary on the plan’s beneficiary designation form. If you wish to split the assets between your heirs and Island Housing Trust, consider giving a percentage of the assets. Your insurance agent or plan administrator will need the following information:

Island Housing Trust  
PO Box 851, Mount Desert ME 04660  
EIN # 22-2993615