



REF

Rockford Education Foundation Resources for Professional Advisors

Supporting Your Clients' Charitable Goals

We value and appreciate the expertise you bring to your clients and want to support your efforts in providing them with resources and counsel when it comes to their philanthropic planning. Our goal is to help keep you — for the benefit of your clients — informed of and inspired by the work happening at the Rockford Education Foundation (REF).

We believe that charitable planning is a process that ideally involves the donor, professional advisors, and our planned giving team. We look forward to partnering with you to ensure your clients find the most meaningful gift that meets their charitable goals. Please be assured that discussions are strictly confidential, and there is no obligation associated with these conversations.

Contact our Team for Assistance

Beth Meyer-Kraff, Executive Director
ref@rockfordschools.org | 616.863.6317

Legal Information

Legal Name: Rockford Education Foundation, Rockford, Michigan

Federal Tax ID #: 38-303469

IRS Status: Rockford Education Foundation is a qualified 501(c)(3) charity. Proof of status is available upon request.

Mailing Address: P.O. Box 777, Rockford, MI 49341

Stock & Securities Transfers

For instructions on transferring stock or securities, please contact us directly:
ref@rockfordschools.org | 616.863.6317

To ensure accurate processing, please notify us of the transfer date, stock name, and number of shares.

Bequest Gifts Through Will/Trust

If your client is interested in supporting the Rockford Education Foundation through a bequest in their will or trust, we have created the following sample language as a helpful resource:

Residual Bequest Language

A residual bequest comes to REF after estate expenses and specific bequests are paid:

We give and devise to Rockford Education Foundation (Tax ID #38-303469), located in Rockford, Michigan, all (or state a percentage) of the rest, residue, and remainder of our estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Bequest Language

Naming REF as a beneficiary of a specific amount from the estate:

We give and devise to Rockford Education Foundation (Tax ID #38-303469), located in Rockford, Michigan, the sum of \$_____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language

REF can be named as a contingent beneficiary if one or more specific bequests cannot be fulfilled:

If (insert name) is not living at the time of our demise, we give and devise to Rockford Education Foundation (Tax ID #38-303469), located in Rockford, Michigan, the sum of \$_____ (or all or a percentage of the residue of our estate) to be used for its general support (or for the support of a specific fund or program).

Alternative Purpose Language

To ensure flexibility in responding to changing needs over time:

If at any time, in the judgment of the Rockford Education Foundation, it is impossible or impracticable to carry out the designated purpose, the Foundation shall determine an alternative purpose as near as possible to the designated purpose.

The information provided here is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited are for illustrative purposes only and references to tax rates include federal taxes only, which are subject to change. State laws may further impact individual results. We encourage donors to consult their financial planner, attorney, and/or tax advisor to ensure that any contemplated gift aligns with their overall circumstances and planning.