GiveWell Legacy Giving Information

Thank you for thinking of GiveWell in your long-term planning. We appreciate your interest in including GiveWell in your will or trust, or as the beneficiary of a life insurance policy, investment account, or retirement account.

To make a legacy gift in the US, you will need our legal name, EIN, and address:

The Clear Fund dba GiveWell
EIN: 20-8625442
1714 Franklin Street #100335
Oakland, CA 94612

Note: For donors in the Netherlands, we are registered as The Clear Fund, and our RSIN is 8262.78.516. Please use this rather than the EIN listed above.

Suggested language for including GiveWell in your will or trust is below. Please note: we recommend using general language, as the structure of our giving recommendations may change over time.

It is helpful for us to know when we have been included in the long-term plans of our supporters. If you've already included GiveWell in your plans, please let us know by filling out GiveWell's Legacy Gift Intention Form. You can do so at https://www.givewell.org/legacy-giving or by mailing in the form below.

If you're interested in speaking about your giving plans or about GiveWell's research and programs more generally, we would appreciate the opportunity to connect with you. If you fill out GiveWell's Legacy Gift Intention Form below, we will be in touch shortly to schedule a call.

A note on beneficiary gift allocations (for life insurance policies, IRAs, brokerage accounts, etc.):

Most financial institutions do not provide space to make a specific designation for your gift. Our default is to allocate gifts made through a beneficiary designation to GiveWell's unrestricted fund. This means that GiveWell will use its discretion to allocate the gift to where it is needed most, including to our operations, subject to our excess assets policy. If you would like to specify a different allocation, for example, to redistribute 100% of the gift to GiveWell's recommended grantee organizations at GiveWell's discretion (the Maximum Impact Fund), you will need to notify us of your desired allocation by filling out GiveWell's Legacy Gift Intention Form below. If this form is filled out, we will keep your wishes on file and allocate accordingly when the gift is made. Please note that we advise against designating a specific top charity as it is quite possible that by the time your gift is made, the composition of our top charity list will be different.

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Suggested language for wills and trusts:

If you would like GiveWell to distribute <u>all</u> funds to recommended grantee organizations:

> *"I give, devise, and bequeath [amount, percentage, etc.] to The Clear Fund dba GiveWell, EIN 20-8625442, for redistribution to recommended grantee organizations at The Clear Fund's sole discretion as to the areas of greatest need, and on a schedule to be determined by The Clear Fund."*

If you would like to support GiveWell operations <u>and</u> recommended grantee organizations (allowing GiveWell to decide how funds should be allocated between the two, subject to our excess assets policy):

> *"I give, devise, and bequeath [amount, percentage, etc.] to The Clear Fund dba GiveWell, EIN 20-8625442, for use at The Clear Fund's sole discretion as to the areas of greatest need, and on a schedule to be determined by The Clear Fund."*

If you would like to support GiveWell operations <u>and</u> recommended grantee organizations (specifying how funds should be split between the two):

> *"I give, devise, and bequeath [amount, percentage, etc.] to the Clear Fund dba GiveWell, EIN 20-8625442. X [amount or %] shall be used for redistribution to recommended grantee organizations at The Clear Fund's sole discretion as to the areas of greatest need, and on a schedule to be determined by The Clear Fund, and Y [amount or %] shall be unrestricted and used at The Clear Fund's sole discretion as to the areas of greatest need, and on a schedule to be determined by The Clear Fund."*

NOTE: NONE OF THIS INFORMATION IS LEGAL OR TAX ADVICE, AND IT SHOULD NOT BE TREATED AS SUCH. WE RECOMMEND THAT YOU CONSULT A QUALIFIED ESTATE PLANNING ATTORNEY WITH ANY QUESTIONS YOU MAY HAVE ABOUT YOUR ESTATE OR ANY TAX CONSEQUENCES OF CHARITABLE GIVING.

1714 Franklin Street #100335
Oakland, CA 94612

Email: donations@givewell.org
Phone: 415-689-5803

GiveWell Legacy Gift Intention Form

Thank you for thinking of GiveWell in your long-term planning. Please mail completed form to GiveWell or complete the form at https://www.givewell.org/legacy-giving. Thank you!

Name: ____

Email address: ______________________________________

Date of birth: _______________________________________

Phone number: ______________________________________

Mailing address: ____

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Type of gift (check all that apply):

- ☐ Beneficiary of Will or Trust
- ☐ Beneficiary of IRA or Brokerage Account
- ☐ Beneficiary of Life Insurance
- ☐ Other ____

If this is a beneficiary gift, please specify your desired allocation. You can read more about the allocation options on our Legacy Giving page at https://www.givewell.org/legacy-giving.

- ☐ Unrestricted fund (to support our operations or grant out to charities at our discretion) ______%
- ☐ Distribute to charities at GiveWell's discretion _______%

Amount: $_______________________

Is there anything else you'd like us to know about this gift? ________________________

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If you are interested in a call with GiveWell, please check here: ☐

If you would like to receive GiveWell's monthly newsletter, please check here: ☐

Thank you for your generous support!