

# How to Give Through a Retirement Beneficiary

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*You can make a lasting impact by designating Lifewater as a beneficiary through a beneficiary designation of retirement assets.*

## Giving Through a Retirement Beneficiary

Leaving your retirement assets (IRA, 401(k), 403(b), pension, or other tax-deferred plan) can help decrease the taxable burden on your estate following death. A charity is not taxed when receiving the asset, and the amount is not subject to income and estate tax liability for you and your heirs.

To name Lifewater as a beneficiary of your Retirement Assets or Bank Accounts simply contact your plan administrator for the appropriate forms and provide Lifewater's legal name and Tax ID Number.

**Legal Name:** Lifewater, Inc.

**Tax ID:** 95-3987142

## Questions? Contact Us.

If you have any questions please contact us at 805.541.6634 or email Christine Zurbach, Vice President of Philanthropy, at [christine@lifewater.org](mailto:christine@lifewater.org).

