JOHNS HOPKINS
UNIVERSITY & MEDICINE

Office of Gift Planning

Share your Plans

PROTECT YOUR WISHES

Many donors include a gift to Johns Hopkins through a will, trust, or retirement account. Sharing your plans with Johns Hopkins through the documentation process helps to define and protect your wishes for your gift and allows us to recognize you for your commitment.

Make a World of Difference

What are the advantages of sharing my plans?
Sharing your plans with Johns Hopkins allows us to better understand your intentions and ensure your gift ends up where you intend. It may seem straightforward, but because of the many schools, divisions, and multiple funding opportunities at Johns Hopkins, using full and correct legal identities is critical. Equally important, if your gift is broadly stated, such as "for research," we'll work together to identify a specific area if desired. Sharing your plans also gives us the opportunity to thank you for your commitment and welcome you into the Johns Hopkins Legacy Society.

What information do you need from me?
We'll ask for copies of the relevant pages of your documents. In the case of a will or revocable trust, we generally request to see copies of the first page, signature page, and pages that refer specifically to your gift to Johns Hopkins. For a gift of retirement assets or life insurance, we request a copy of the beneficiary form showing Johns Hopkins as a beneficiary. In all cases, to aid our planning, we ask for your best estimate of the gift's current value, if it isn't already stated in the document.

What else can I expect?
After reviewing your plans together, we'll prepare a brief summary of your gift. This gift summary, signed by both parties, serves as an outline that highlights your wishes, specific financial terms, and other important details. The gift summary remains confidential but helps to ensure that your gift for the future is counted today in Johns Hopkins' fundraising goals.

What if my plans change?
The gift summary is not binding. We understand that circumstances can change and acknowledge in the gift summary that your plans may be modified.

How do I move forward?
To start the process, contact the Office of Gift Planning. We look forward to ensuring your wishes are met and thanking you for your support of Johns Hopkins.

Special Recognition
The Johns Hopkins Legacy Society recognizes donors who let us know Johns Hopkins is in their plans or who establish a life income gift. Legacy Society members receive special acknowledgement and an invitation to the annual Johns Hopkins Legacy Society Luncheon.

CONTACT US
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