



Fuel Fund of Maryland — 1981 Giving Circle – Estate Planning

Leave a Legacy. Keep Maryland Households Connected

A Donor's Guide to Planned Giving

How to Talk with Your Financial Planner About Leaving a Legacy Gift

Making a planned gift is a meaningful way to help Maryland households stay safely connected to essential energy services. This guide provides simple language and key information to help you begin a conversation with your financial planner, attorney, or insurance professional.

Starting the Conversation

You may use the following introductory statements when meeting with your advisor:

Option A — General Planned Giving

I would like to explore including a charitable gift to the Fuel Fund of Maryland in my estate plans. Can you help me understand the best options for my financial situation?

Option B — Life Insurance Beneficiary

I am considering naming the Fuel Fund of Maryland as a beneficiary on my life insurance policy. Can you walk me through the steps and ensure the designation is recorded properly?

Option C — Will or Trust

I'm interested in adding a bequest to the Fuel Fund of Maryland in my will or trust. Could you advise me on the appropriate wording and any tax considerations?

Ways to Leave a Legacy Gift

Your advisor may help you explore options such as:

- Life Insurance Beneficiary: Name the Fuel Fund of Maryland as a primary or partial beneficiary.
- Will or Living Trust: Leave a specific amount, percentage, or residual gift.
- Retirement Accounts (IRA, 401k, etc.): Add FFM as a beneficiary—often with tax benefits.
- Donor-Advised Funds: Designate FFM as the successor beneficiary of your DAF.

These options provide flexibility and can be tailored to your goals and family considerations.

Information Your Advisor Will Need from the Fuel Fund of Maryland

Provide your advisor with the following information about the organization:

- Legal Name: Fuel Fund of Maryland, Inc.
Tax ID (EIN): 52-1204629
Address: 57 West Timonium Road, Suite 208, Timonium, MD 21093
Type: 501(c)(3) nonprofit organization
Mission: Helping Maryland households afford and maintain essential home energy service.

Sample Language for Estate Documents

Your advisor may appreciate sample wording, such as:

"I give and bequeath to Fuel Fund of Maryland, Inc., a nonprofit organization located in Maryland, Tax ID 52-1204629, the sum of \$_____ (or _____% of my estate), to be used in support of its mission to assist Maryland households with critical energy needs."

Join the 1981 Power Circle

If you choose to include the Fuel Fund of Maryland in your plans, you will be welcomed into our 1981 Power Circle, honoring donors who create long-term impact through legacy giving.

We're Here to Assist You

For questions or to notify us of your planned gift:

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