

ADVISOR'S GUIDE FOR PLANNED GIVING

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name the Daniel Murphy Scholarship Fund in your will or trust please use the following suggested language:

Residual Bequest Language — A residual bequest comes to us after your estate expenses and specific bequests are paid.

I give and devise to Daniel Murphy Scholarship Fund (Tax ID: 36-3675466) all (or state a percentage) of the rest, residue, and remainder of my 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 the Daniel Murphy Scholarship Fund as a beneficiary of a specific amount from your estate is easy.

I hereby give the residue (or _____ percent of the residue) of my estate to Daniel Murphy Scholarship Fund (Tax ID: 36-3675466), to further the objectives and purposes of the Fund (or specify a program).

Contingent Bequest Language — the Daniel Murphy Scholarship Fund can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

If (insert name) is not living at the time of my demise, I give and devise to Daniel Murphy Scholarship Fund (Tax ID: 36-3675466), the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:

If you wish to make a donation of stock to the Daniel Murphy Scholarship Fund, please contact: Tim Kennedy, Chief Advancement Officer, at 312-455-7802 with the following information:

Donor: name

Stock: name, number of shares and value

How to credit the donation (i.e. unrestricted, restricted, etc.)

Please ask your broker to transfer your securities to:

DTC# : 0015 Morgan Stanley c/o Bruce Becker

Account Name: Daniel Murphy Scholarship Fund (Tax EIN # : 36-3675466)

FBO Account #: 628-051643-635

Please copy tim@dmsf.org on your request so we can appropriately credit you.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or all other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Tim Kennedy, Chief Advancement Officer.

Legal name: The Daniel Murphy Scholarship Fund

Federal tax ID number: 36-3675466.

Incorporated in: 309 West Washington, Suite 700, Chicago, IL 60606

Note to Attorneys, Accountants and other Professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Tim Kennedy, Chief Advancement Officer, at 312-455-7802.