



Designate Columbus Academy as a Beneficiary

Did you know that you can name Columbus Academy as the beneficiary of retirement, investment and bank accounts, or as the successor beneficiary of your donor advised fund (DAF)?

How to Proceed: Three Steps

- Complete your plan administrator's change of beneficiary (COB) form, naming Columbus Academy as a full or percentage beneficiary of your account.
- Once the COB form has been processed by your plan administrator, provide a copy to our office.
- Contact our office to confirm how you would like your gift to be used. We will assist you in documenting your gift intentions.

The Benefits

- The process is simple and does not require an attorney.
- Continue to use your assets as needed during your lifetime.
- When left to an individual who is not a spouse, gifts of retirement account assets are subject to income tax. Because Columbus Academy is a charitable organization, one hundred percent of your gift will be transferred and used as you intended.

Our office is happy to work with you or your advisor on making your gift possible. Please contact Maria Miller, JD, at (614) 475-2311 or millerm@columbusacademy.org to talk.

Donors should consult with their attorney and/or tax advisor to determine the most advantageous giving strategies for their personal circumstances.

Planning tips

You may name Columbus Academy as a full or percentage beneficiary of these accounts.



**Columbus
Academy**

Development Office
4300 Cherry Bottom Road
Gahanna, OH 43230

(614) 475-2311
Federal Tax ID 31-4379445