



Legacy & Planned Giving Information

Economic Mobility Pathways (EMPath) and our legacy organizations (The Women's Educational and Industrial Union, 1877 and the Crittenton Home, 1824) have benefited from the enduring generosity of charitably minded individuals over the course their lifetimes. For many of these people, a planned gift to Economic Mobility Pathways via a bequest or other testamentary provision fulfills the work these donors were committed to during their lifetimes.

Bequests to Economic Mobility Pathways can be designated for a specific mission-focused purpose or given to provide general operating, and can be made for a specific dollar amount or a specific asset, such as a painting or real estate. Another option is to leave a bequest of the residue of your estate or a percentage of the residue of your estate.

To ensure your wishes are followed, we encourage you to consult with an attorney knowledgeable in estate planning to determine that your will is written properly. If your will already is in place, it is possible to add a codicil — an amendment to your will that includes a charitable bequest. You also may include Economic Mobility Pathways in your revocable trust. An attorney should see that all state and other requirements are met so that your will is valid and up-to-date. Notifying us of your intention to make a bequest qualifies you for membership in Economic Mobility Pathways legacy giving group.

- Suggested language for a bequest for unrestricted use
"I give [insert dollar amount or percentage of residuary estate] to Economic Mobility Pathways of Boston, Massachusetts, for its general use and purposes."
- Suggested language for a bequest for restricted use
"I give [insert dollar amount or percentage of estate] to Economic Mobility Pathways of Boston, Massachusetts, to support [choose one or more of the following: direct service programs in Boston; scaling initiatives] programs and services. If, due to a change in circumstances, it is not practical to use this fund for this purpose, Economic Mobility Pathway's Board of Directors may designate such other use, which, in their opinion, most closely fits my original intent."



TAX STATUS AND IDENTIFICATION NUMBER

Economic Mobility Pathways is a 501(c)(3) tax-exempt, charitable organization headquartered at One Washington Mall, Boston, MA 02108. Our federal tax identification number is 04-2104046. Your attorney may want to include this number in your will or trust to help your executor facilitate your bequest.

We suggest that you consult with legal counsel regarding any bequest, trust provision or retirement plan designation. We are available to work with your professional advisors. Economic Mobility Pathways does not provide legal or tax advice.

Stock Gifts

A gift of stock will help EMPATH's families and scaling initiatives, and may alleviate your tax burden. Please consult your financial advisor if the stock has appreciated or depreciated in value since you acquired it. EMPATH's banking information is below. Please notify EMPATH's Institutional Advancement office (617-259-2932) in advance of your stock transfer so that proper acknowledgement may be made.

DTC number: 0226

Economic Mobility Pathways' account number: Z50812471

CONTACT US

To learn more about making a bequest or stock gift to Economic Mobility Pathways, please contact Nicki Ruiz de Luzuriaga, Vice President of Institutional Advancement: nluzuriaga@empathways.org. Economic Mobility Pathways is located at One Washington Mall, Boston, MA, 02108.