

Bequests to Support The World Security Institute (formerly The Center for Defense Information)

We deeply appreciate your consideration of a planned gift to support our work. For 35 years, CDI has been an independent source of research, information, and informed opinion on U.S. defense issues. Your gift will help insure that our work will continue for the benefit of future generations.

Our Name

In late 2005 after careful consideration, the Center for Defense Information's Board of Directors decided that, because CDI had launched a variety of international programs related to global security, its name should reflect its full complement of projects.

Therefore, the World Security Institute was adopted as the new organization name, and the Center for Defense Information became one of its divisions comprising all U.S.-focused defense studies. Our organization did not merge, or move, but only re-organized its internal structure.

So that your gift can be most useful, we ask that the terms of the bequest be as general as possible—made simply to the World Security Institute, (the former CDI). If you do prefer the funds be dedicated to the “new” CDI division, it must be made to the World Security Institute for its Center for Defense Information.

A Bequest is:

- Easy to arrange;
- Does not affect your assets or cash flow during your lifetime;
- Is revocable.

You Can Make Your Bequest in Several Ways:

A bequest can deliver a specific dollar amount or asset to our organization or it can give us a percentage of the balance remaining in your estate after taxes and specific bequests have been paid. It can also be payable if an individual beneficiary is not able to inherit.

Specific bequest examples:

“I bequeath Twenty Thousand (\$20,000) Dollars {or: all my General Electric stock} to the World Security Institute, a non-profit corporation located in Washington, District of Columbia.”

Residuary Bequest examples:

“I bequeath Ten Percent (10%) of the residue of my estate to the World Security Institute, a non-profit corporation located in Washington, District of Columbia.”

Contingent Bequest:

“If my nephew does not survive me or is unable to inherit this bequest, I direct that it be paid to the World Security Institute, a non-profit corporation located in Washington, District of Columbia.

Please contact Drew Portocarrero, Executive Vice President, at (202) 797-5282 or aportocarrero@worldsecurityinstitute.org for more information. Again, thank you for your thoughtfulness in considering this gift.

PLEASE NOTE: As suggested by IRS Circular 230, the World Security Institute advises you that you should seek your own legal and tax advice in connection with all charitable gift and planning matters. The World Security Institute does not provide legal or tax advice. The entire contents of this message and any documents or materials sent with it as attachments may not be used or treated as legal or tax advice, and merely reflect ideas and opinions of the sender for the purpose and benefits of the World Security Institute.