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Leaving a Legacy of Helping Others

Thank you for your continued support of York Literacy Institute (YLI) and for taking the time to consider us as part of your important estate planning. Our aim is to provide you with information that helps you understand the process and gives you several options for legacy gifts. This is not legal or professional planning advice.

Every gift helps YLI continue to provide free education, vital support, and resources that help hundreds of York County adults each year to build brighter futures — for themselves, for their families, and for the York community. Your legacy support will have a profound impact on our vision to achieve a 100% literacy rate in York County.

YLI remains dedicated to teaching essential skills in English language, reading, writing, and mathematics for adult learners. With increased demand for career readiness, we've also expanded our offerings to include digital literacy, workplace development, and career pathways in healthcare and manufacturing. **Our programs are designed to empower students, like Megan, to reach their goals.**

Growing up in York, Megan faced numerous challenges that prompted her to leave high school early. In 2017, she enrolled at YLI and began attending classes to earn her High School Equivalency certificate, but stopped because of a lack of reliable transportation, motivation, and eventually, the COVID pandemic. A few years later, she realized her potential and the value of education, and she returned to YLI with a renewed focus that paid off. In December 2024, Megan earned her High School Equivalency certificate! She credits YLI's staff with helping her reach her goals through consistent communication, encouragement, and flexibility. Having met this goal has boosted her confidence and transformed her perspective on opportunities for careers. "Don't let anything hold you back," Megan says, "I'm 25, and I just got my High School Equivalency Certificate. York Literacy Institute can help you get where you want to be."

We are grateful for your consideration and continued support for YLI and the community we serve.

Sincerely,

Jason McSherry
President & CEO
York Literacy Institute



Considerations as you begin your estate planning

Do you already have a will? If you do, you have already started the process of leaving your legacy.

It is recommended that you review your will every 3-5 years or after major life changes, such as changes in marital status, a birth or death in the family, moving to a new state, changes in tax laws or updates to beneficiaries. At any time, you can include a legacy of support to YLI in your estate planning, a great way to further express what you supported and valued in life.

It is easy to include the York Literacy Institute as a charitable bequest in your will. If you have an existing will already, you can do this without having to update your entire will. Ask your attorney about doing so through a codicil to your existing will.

When it comes to creating a will and leaving a legacy it is important to have the proper team in place which should include the following:

1. You
2. Your spouse
3. An estate planning attorney
4. A certified public accountant (CPA)
5. Your financial planner
6. If giving to a non-profit, your charity's Development Director
7. Personal Guardians/Benefactors

Giving Options

Listed below are several options if you wish to name York Literacy Institute as a beneficiary. These are only suggestions, and your attorney would be able to provide the proper legal documents needed. Each option includes a language sample for the gift.

Residual Bequest gives whatever funds are left after your friends and loved ones are provided for. This is a very popular choice for charitable bequests because it ensures that loved ones receive their distribution before any distribution to charity. Sample wording of a residual bequest may look like the following: *"I devise the residue of my estate, after the satisfaction of all specific bequests and the payment of all taxes and other costs attending my death, to the York Literacy Institute, a not-for-profit corporation, Tax ID# 23-2088132, currently located at 1416 6th Avenue, York, Pennsylvania 17403."*

General/Fixed Dollar Bequest is a stated sum of money, usually cash, to a beneficiary. Sample wording of a general/fixed dollar bequest may look like the following: *"I bequeath the sum of "x" dollars to the York Literacy Institute, a not-for-profit corporation, Tax ID# 23-2088132, currently located at 1416 6th Avenue, York, Pennsylvania 17403."*

Percentage Bequest enables your bequests to grow as your assets grow. Sample wording of a percentage bequest may look like the following: *"I bequeath to the York Literacy Institute, a not-for-profit corporation, Tax ID# 23-2088132, currently located at 1416 6th Avenue, York, Pennsylvania 17403, an amount equal to "x" percent of the net value of my estate as finally determined for federal estate tax purposes."*



Contingent Bequest assumes you want to leave your entire estate to family and friends. However, if you outlive any of your beneficiaries, it provides an opportunity to designate the York Literacy Institute to receive that portion of the estate. Sample wording of a contingent bequest may look like the following: “In the event that (name of the beneficiary) does not survive me, I designate York Literacy Institute, a not-for-profit corporation, Tax ID# 23-2088132, currently located at 1416 6th Avenue, York, Pennsylvania 17403 as the devisee of this bequest of (see above for language specific to different types of bequests.)

Gifts of Retirement Plan assets. Because retirement plans are taxed differently than most assets, they may become a tax liability to individual heirs. Retirement funds may be subject to both estate and income taxes. Donating a specific dollar amount or a percentage of a retirement plan to a tax-exempt organization like the York Literacy Institute may, therefore, be an attractive option. Simply name the York Literacy Institute as one of your beneficiaries: “York Literacy Institute, a not-for-profit corporation, Tax ID# 23-2088132, currently located at 1416 6th Avenue, York, Pennsylvania 17403.

Gifts of Bank Accounts, Certificates of Deposit or Brokerage Accounts. By placing a payable on death (POD) designation on your bank account or certificate of deposit, you can name the York Literacy Institute as the beneficiary of all the funds upon your death. By placing a transfer on death (TOD) designation on your brokerage or investment account, you can name the York Literacy Institute as the beneficiary of all, or a percentage of, the account. Simply contact your bank or brokerage firm for the appropriate form.

Gifts of Life Insurance and Commercial Annuities. You can name the York Literacy Institute as the beneficiary of all, or a percentage of, your life insurance or commercial annuity. Simply contact your bank or insurance company for a beneficiary designation form.

These are brief descriptions of some of your options. To discuss all your legacy gift options, consult with your financial advisor, accountant and or attorney. If you need additional help or have questions for someone from the York Literacy Institute, please reach out to Kristen Wilson, Director of Development at 717-845-8719 x1010 or email Kristen at funddev@yorkliteracy.org.

Thank you!