

Bequests for CHARITY

Legal Requirements:

1. Any testamentary, lifetime, or revocable gift should give the correct legal name of the CHARITY: the CHARITY.
(IRS Tax Identification Number ___ - _____)
2. The purpose of the gift should also be incorporated.

Suggested Language:

Percentage Bequest (*Recommended*)

"I direct that the CHARITY shall receive (indicate specific percentage) percent of my estate free from and undiminished on account of any debts, expenses of administration, or death taxes. This bequest is unrestricted and the BOARD OF TRUSTEES/DIRECTORS, or other governing body may use and expend the same for the benefit of the CHARITY in any manner it deems appropriate."

Remainder Bequest

"I direct that the CHARITY shall receive (indicate specific percentage) percent of my net residuary estate after the payment of all my debts and expenses of administration (other than death taxes). This bequest is unrestricted and the BOARD OF TRUSTEES/DIRECTORS, or other governing body may use and expend the same for the benefit of the CHARITY in any manner it deems appropriate."

Specific Bequest

"I give and bequeath to the CHARITY the sum of (indicate specific amount). This bequest is unrestricted and the BOARD OF TRUSTEES/DIRECTORS, or other governing body may use and expend the same for the benefit of the CHARITY in any manner it deems appropriate."

Restricted Bequest

Should you wish to make a bequest, restricted for a specific purpose, please contact us so we may create the wording necessary to accomplish your intentions.

If you have any questions on how to include CHARITY in your will or trust, how to plan your gift, or how to make an outright or estate gift to CHARITY, please call or write:

Development Office