



**MARKETING – Planned Giving Fact Sheets - This is your planned giving brochure**  
**Use this document to respond to prospect enquiries**  
**You can customize every enquiry to the prospect's interest**  
**Instead of sending a brochure that outlines every planned giving method**  
**USE ON YOUR ORGANIZATION'S EXISTING LETTERHEAD**

## Charitable Will Bequest

### Sample Charitable Bequest Language

These are sample clauses only. Your lawyer or estate planner should review any wording.

#### **Specific, unrestricted:**

I give, devise and bequeath to (Insert Your Organization's Name HERE) the sum of \$\_\_\_\_\_ to be used for any purpose(s) approved by the Board of Directors of (Insert Your Organization's Name HERE).

#### **Specific, restricted with escape clause:**

I give, devise and bequeath to (Insert Your Organization's Name HERE) the sum of \$\_\_\_\_\_ to be used for the following purpose(s) \_\_\_\_\_.

If (Insert Your Organization's Name HERE) is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of (Insert Your Organization's Name HERE).

#### **General % unrestricted:**

I give, devise and bequeath to (Insert Your Organization's Name HERE) \_\_\_\_\_% of the residue of my estate to be used for any purpose(s) approved by the Board of Directors of (Insert Your Organization's Name HERE).

#### **General %, restricted with escape clause:**

I give, devise and bequeath to (Insert Your Organization's Name HERE), \_\_\_\_\_% of my estate to be used for the following purpose(s) \_\_\_\_\_.

If (Insert Your Organization's Name HERE) is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose(s) approved by the Board of Directors of (Insert Your Organization's Name HERE).

#### **Residual contingent trust:**

Upon the death of the survivor of my (wife, husband, etc.) \_\_\_\_\_ and my (son, daughter, etc.) \_\_\_\_\_, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to (Insert Your Organization's Name HERE) to be used for any purpose(s) approved by the Board of Directors of (Insert Your Organization's Name HERE).