**Sample Bequest Provision Language**

Official Institution/Organization Name:

Postal Address:

Federal Tax I.D. Number:

**Unrestricted Expendable Bequest:**

I hereby give \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\* to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, a charitable organization, to support the objectives and purposes of the organization.

**Unrestricted Endowed Bequest:**

I hereby give \_\_\_\_\_\_\_\_\_\_\_\_\_\_\* to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (hereinafter, "the organization"), a charitable organization. The property comprising this gift may, for investment purposes, be merged with any of the investment assets of the organization, but the gift shall be entered in the organization’s books and records as an endowed fund known as THE \_\_\_\_\_\_\_\_\_\_\_\_\_ FUND (the "Fund"). The organization shall use the endowment payout from the Fund to support the objectives and purposes of the organization.

**Expendable Bequest for a Specific Purpose**

I hereby give \_\_\_\_\_\_\_\_\_\_\_\* to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, a charitable organization, for the purpose of:

* List specific purpose/program
* List specific purpose/program
* List specific purpose/program

**Endowed Bequest for a Specific Purpose**

I hereby give \_\_\_\_\_\_\_\_\_\_\_\_\_\_\* to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, a charitable organization, (hereinafter, "the organization"), a charitable organization. The property comprising this gift may, for investment purposes, be merged with any of the investment assets of the organization, but the gift shall be entered in the organization’s books and records as an endowed fund known as THE \_\_\_\_\_\_\_\_\_\_\_\_\_ FUND (the "Fund").

The organization shall use the endowment payout from the Fund for the specific purpose of:

* List specific purpose/program
* List specific purpose/program
* List specific purpose/program

**To Prepare for the Unexpected**

Inclusion of the following language is optional, but suggested, in order to ensure that a bequest designated for a specific use will always remain productive if circumstances change unexpectedly:

“If, in the judgment and discretion of the governing board of the organization, changed circumstances should at some future time render the designated use of this gift no longer appropriate, then the governing board of the organization shall have the right to use the gift in support of other objectives and purposes of the organization, giving due consideration to my special interest as evidenced by the purposes described above.”

\* Fill in the blank with the dollar amount, percentage of estate, or specific property you intend to give to the organization.