



Neighborhood House Sample Bequest Language

A gift to Neighborhood House through your will or living trust allows you to make a meaningful contribution that supports Neighborhood House efforts far into the future, yet costs you nothing today.

A charitable bequest can be in the form of a precise dollar amount or a specific property.

You can also designate a residual charitable bequest, which is determined after payment of specific amounts to heirs. Bequests, like other gifts, can be restricted for a specific purpose or given without such constraints. If you already have a will, you can append a charitable bequest with the simple addition of a codicil.

Charitable bequests will not alter your lifestyle, and they can be easily modified to address your changing needs. Perhaps these model provisions will be helpful to you and your attorney.

General Unrestricted Bequest Language

Since your charitable bequest may not come to Neighborhood House for many years, general bequests are the most valuable as they allow

Neighborhood House to apply your funds wherever the need is greatest at the time.

Sample Language:

I give to Neighborhood House (Tax ID 38-1956214) a non-profit 501 (c) (3) organization located in Rochester Hills, Michigan, the sum of \$ _____ (OR _____% of my estate OR the property described herein). The property comprising this gift may be used for its general support and charitable purposes without restriction, at the discretion of its board of directors.

Restricted Bequest Language

As with any gift, donors can restrict bequests for specific purposes. If you create a restricted bequest, please give Neighborhood House flexibility to meet unforeseen circumstances.

Sample Language:

I give to Neighborhood House (Tax ID 38-1956214), a non-profit 501 (c) (3) organization located in Rochester Hills, Michigan, the sum of \$ _____ (OR _____% of my estate OR the property described herein) to be used for _____ (specify purpose). If, in the opinion of the directors or their successors, it becomes impossible or impractical for my gift to be used for the above charitable purpose, Neighborhood House shall use my gift for a purpose and in a manner that most closely meets the above charitable purpose.



Contingent Bequest Language

Sometimes situations change after a will is drafted; the people and charities named in our will may not be there in the future. In such cases, naming Neighborhood House as a contingent beneficiary can be a great alternative. If your will does not name contingent beneficiaries, the government will decide how to disburse your assets or might even inherit your estate.

Sample Language:

If (insert name) is not living at the time of my demise (or if Name of Charity is no longer in existence), I give (a percentage of the estate, specific dollar amount, remainder of estate after all other bequests & expenses, etc.) to Neighborhood House (Tax ID 38-1956214), a non-profit 501 (c) (3) organization located in Rochester Hills, Michigan, to be used for its general support and charitable purposes without restriction (or you may use the restricted bequest language above to define a specific purpose for your charitable bequest).

The information on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law

Please notify Neighborhood House of your intention of a legacy gift by completing the following form so that we can recognize you as a member of our 1968 Legacy Society.