



# Leave a Legacy...a simple bequest makes a BIG difference

A charitable bequest, a gift through your will, is by far the most popular method of planned giving and is fully deductible for estate tax purposes. A bequest can be prepared at anytime, whether you include it when planning your will or add it later by codicil. Bequests can be of any dollar amount you choose, a percentage of your estate, or whatever is left after the other gifts you have named (residual).

Benton County is a special place to call home. Whether you grew up here, grew old here, or both, we hope you will consider a bequest, or other planned gift, to make sure the things you loved best about this community are available for the next generation.

## Sample Bequest Language

Use these samples to plan a gift that will support the work of the Foundation in the future. Already have a will? Contact Foundation staff for a sample codicil that can be completed at any time to include a gift to the Foundation.

### Gift of a Specific Amount:

*I give \$\_\_\_\_\_ to Benton Community Foundation, a non-profit corporation located at Fowler, Indiana, to be held for investment in its endowment fund, the annual income therefrom to be used for general charitable purposes.*

### Gift of a Specific Percentage:

*I give \_\_\_\_ percent of my estate to Benton Community Foundation, a non-profit corporation located at Fowler, Indiana, to be held for investment in its endowment fund, the annual income therefrom to be used for general charitable purposes.*

### Gift of Residual:

*I give the rest, remainder, and residue of my estate to Benton Community Foundation, a non-for-profit corporation located at Fowler, Indiana, to be held for investment in its endowment fund, the annual income therefrom to be used for general charitable purposes.*

Interested in using your gift for a specific purpose? Contact Foundation staff for help creating the language that would allow you to add to an existing fund or create a new named fund with your bequest. Funds can support any charitable interest you choose whether it be your church, a local library, or an area of interest such as education or youth recreation.

## Disclosure

This language is for informational purposes only. The contents are not intended as legal advice to donors or potential donors on their personal gift and estate planning. Please seek guidance from your independent counsel for applicability of these principles to your personal circumstances.