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Bequest Language – *for professional advisor use*

The following sample language can be used for estate gifts through:

- Wills
- Living Trusts
- Retirement Plans Designations
- Life Insurance Beneficiary Designations
- Contingent provisions in any of the above estate documents

Each individual situation is unique: therefore, these are basic sample provisions. To assist you with your client's plans, the Unity Foundation of La Porte County, Inc. can provide customized sample language for the causes your client may wish to support. To request customized language, please contact Maggi Spartz, President or Warren Ransom, Professional Advisor Liaison at 219-879-0327.

Suggested Bequest Language **Percentage of Estate or Residuary Bequest**

"I give to the Unity Foundation of La Porte County, Inc. (Federal Tax ID #35-165-8674) a nonprofit corporation located in Michigan City, Indiana, an amount equal to _____ percent of the total value of the assets in my estate (or the residue of my estate), whatever the amount shall be at the time of my death. This gift is for discretionary purposes to meet the highest priority needs of the community as those arise (Community Fund) or are to be added to the (name the existing endowment of the Foundation here _____ Unity Foundation Fund ID Code _____)."

Alternatively, your client may establish an endowment for a specific purpose through his or her estate by stating, "This gift is to be added to the _____ Fund with the Unity Foundation Fund ID Code of _____ and used in accordance with the written agreement entered into by me and the Community Foundation during my lifetime."

In this case, we work with you and your client to establish the fund particulars in a separate document that may be amended at any time before the bequest is received. This avoids the necessity of amending estate documents if a client changes his or her mind about the purpose of the fund.

Specific Bequest

"I give to the Unity Foundation of La Porte County, Inc. a nonprofit corporation located in Michigan City, IN (Federal Tax ID #35-165-8674) all my right title and interest in the following described property: (list property here _____). This gift is for discretionary purposes to meet the highest priority needs of the community as those arise (Community Funds) OR is to be added to the (name the existing endowment of the Foundation Fund here: _____ Unity Foundation Fund ID Code _____)."

Alternatively, your client may establish an endowment for a specific purpose through his or her estate by stating, "This gift is to be added to the _____ Fund with the Unity Foundation Fund ID Code of _____ and used in accordance with the written agreement entered into by me and the Community Foundation during my lifetime." In this case, we work with you and your client to establish the fund particulars in a separate document that may be amended at any time before the bequest is received. This avoids the necessity of amending estate documents if a client changes his or her mind about the purpose of the fund.