

Sample Bequest Language

*Create a Jewish Legacy and its partner organizations do not provide legal advice.
Donors are encouraged to seek independent tax and legal counsel.*

GENERAL UNRESTRICTED BEQUEST

Flexible amount -- greater of fixed dollar amount or percent of total estate

I devise and bequeath to (legal name of organization), (legal address of organization), the greater of (A) _____ dollars (\$ _____) or (B) an amount equal to ____ percent (___%) of my residuary estate for its general charitable purposes. The Executor of my estate shall first use any property, the receipt of which by my estate would constitute income in respect of a decedent for federal income tax purposes in satisfying this bequest.

RESTRICTED FUND BEQUEST

Flexible amount -- greater of fixed dollar amount or percent of total estate

I devise and bequeath to (legal name of organization), (legal address of organization), the greater of (A) _____ dollars (\$ _____) or (B) an amount equal to ____ percent (___%) of my residuary estate for the purposes of _____ (e.g., Jewish education, aging services, etc.). The Executor of my estate shall first use any property, the receipt of which by my estate would constitute income in respect of a decedent for federal income tax purposes in satisfying this bequest.

