



## Sample Bequest Language

Thank you for considering making a charitable bequest to St. Paul's! Legacy gifts are some of the most impactful gifts we receive, and they help sustain St. Paul's charitable mission to provide quality care and a meaningful life for our residents, regardless of their financial resources.

### What is a charitable bequest?

A charitable bequest is simply a distribution from your estate to a charitable organization through your will. There are different kinds of bequests. For each, there is specific language to ensure your wishes are carried out as you planned.

The following information is intended to help you and your attorney when drafting your charitable bequest. If you have any questions, please contact Dawn Hartman, Director of Strategic Giving, at 724-589-4611 or [dhartman@sp1867.org](mailto:dhartman@sp1867.org).

### TYPES OF BEQUESTS

- **Specific Bequest** - For gifting a certain dollar amount, appreciated security or other asset to St. Paul's.

#### *Sample Language:*

*I bequeath the sum of \$\_\_ (or \_\_% of my estate) to St. Paul Homes, a not-for-profit organization, Tax ID# 25-0773080, located at 339 E. Jamestown Rd. in Greenville, PA, 16125.*

- **Residuary Bequest** - For gifting the remaining portion of your estate to St. Paul's after specific amounts are distributed to other beneficiaries.

#### *Sample Language*

*I devise and bequeath the residue and remainder of my estate to St. Paul Homes, a not-for-profit organization, Tax ID# 25-0773080, located at 339 E. Jamestown Rd. in Greenville, PA, 16125.*

- **Contingent Bequest** - For gifting your estate to St. Paul's if your primary heir(s) pass away before you.

#### *Sample Language*

*In the event that (insert name) does not survive me, I bequeath St. Paul Homes, a not-for-profit organization, Tax ID# 25-0773080, located at 339 E. Jamestown Rd. in Greenville, PA, 16125 all (or \$ amount or %) of my estate.*

**For more information, please contact:**

Dawn Hartman, Director of Strategic Giving

**Phone:** 724-589-4611

**Email:** [dhartman@sp1867.org](mailto:dhartman@sp1867.org)