Sample Bequest Language

Create Your Jewish Legacy and its community 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.