

Bequest Letter and Enclosures

You can respond to requests for general information about making a bequest to your organization by adapting and sending the cover letter and enclosures found in sequence in this section. Response time should be same day or next day after the request is received.

The “**We Want To Thank You**” form below assumes you have a “Legacy Circle” recognition society. If you do, substitute its name for “Legacy Circle.” If you don’t, start a planned gift recognition program (see *Legacy Circle* under *Promotions in Marketing*).

(Bequest Cover Letter)

Dear _____,

Thank you for your inquiry regarding the proper wording for remembering our organization in a will or trust.

Our organization is deeply appreciative of your willingness to provide for its work through your estate plan. Bequests are critically important to our organization. They provide a source of support that is not subject to fluctuations in the economy. They come from individuals whose loyalty to our work runs very deep.

The enclosed wording is for educational purposes only. It is always best to review any changes in your will with an attorney to make sure that the change is consistent with your entire estate plan.

Again, our organization appreciates your thoughtful bequest. If you have any questions about the enclosed, please contact (name and phone number of contact person).

Sincerely,

How to remember our organization in your estate plan.

Four of the most popular forms bequests can take are:

A fixed amount of money or a designated property:

"I give to (legal name and tax identification number), located in (City), (State),
\$_____ (or describe the real or personal property, including exact location.)

A percentage of the estate:

"I give to (legal name and tax identification number), located in (City), (State),
_____ % of my estate."

A residual bequest:

"I give all the residue of my estate, including real and personal property, to (legal name and tax identification number), located in (City), (State).

A double-purpose bequest. You can provide a relative or friend with income for life through a special gift to our organization. You can do this by establishing a charitable trust through your Will. Upon your death, the trust pays income to the person you designate. After that person's death, whatever remains in the trust passes to our organization. Call our organization at (phone) for further information.

If you wish to have your bequest applied to a specific program, simply add "...for the benefit of (name of program)" to the language suggested above.

Consult an attorney when preparing legal documents.

We Want To Thank You

Dear

Our organization is pleased to recognize those who have left charitable bequests, established charitable trusts, or used some other form of estate planning to support our work. To enroll in our Legacy Circle, which honors those who have made this commitment, fill out and mail this form:

(Your organization's contact person)
(Address)

Dear (name of contact person),

Check one:

- I have remembered your organization through a bequest in my will or trust or through some other form of estate gift. Please enroll me in your Legacy Circle. You may publish my name.
- I have remembered your organization through a bequest in my will or trust or through some other form of estate gift. Please enroll me in the Legacy Circle. **Do not, however, publish my name.**

Donor comments (optional): _____

Name(s) (Please Print) _____

Address _____

City _____ State ____ Zip _____

Signature _____ Date _____

(Written documentation of your bequest is *not* required for Legacy Circle membership. However, if you wish to provide us with documentation, you need send only a copy of the page from your will, living trust or other legal document that references your gift and a simple identification of the document itself such as the first page. Doing so will help us both to plan for the future and to insure that your wishes are carried out.)