

**SAMPLE BEQUEST LANGUAGE**  
**for supporters of Children’s Home Society of Washington**  
**and their legal advisors**

**Types of Estate Planning Instruments Used To Make Bequests**

Most people who make bequests do so through their wills. If you already have a will, you can add a bequest to Children’s Home Society of Washington (CHSW) by means of a simple document called a codicil. In some cases, donors who have revocable living trusts choose to make a future gift to CHSW through the equivalent of a bequest, namely a charitable distribution provision in the trust agreement. Usually, an existing trust agreement can easily be amended to include such a provision. *Regardless of the instrument you use, be sure to seek the assistance of your attorney.*

**Forms of Bequests**

Specific sum of money: “I give to Children’s Home Society of Washington, currently located at [street address, city, state, ZIP Code], or its successor organization, the sum of [insert here the exact dollar amount].”

Specific property such as real estate, stocks, bonds, works of art, or other items:

“I give to Children’s Home Society of Washington, currently located at [street address, city, state, ZIP Code], or its successor organization, [insert here a description of the particular property].”

Rest and residue of your estate after paying debts, taxes, expenses, and other bequests:

“I give to Children’s Home Society of Washington, currently located at [street address, city, state, ZIP Code], or its successor organization, all [or a stated percentage] of the rest, residue, and remainder of my estate.”

Contingent bequest if you are not survived by certain individuals:

“If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to Children’s Home Society of Washington, currently located at [street address, city, state, ZIP Code], or its successor organization [insert here the exact dollar amount, description of property, or percentage of residual estate].”

(**Note:** Many other types of contingencies can be addressed.)

**Bequests for Restricted Purposes**

If the bequest is for a restricted purpose, use the relevant language above and designate the particular program or area of activity to be supported.

Example: “I give to Children’s Home Society of Washington, currently located at [street address, city, state, ZIP Code], or its successor organization, the sum of [insert here the exact dollar amount, description of property, or percentage of residual estate], to be used for [state purpose].”

### **Bequests to Establish Named Endowed Funds**

To establish a named endowed fund, the following language should be used.

"I give to Children’s Home Society of Washington, currently located at [street address, city, state, ZIP Code], or its successor organization, [insert here the exact dollar amount, description of property, or percentage of residual estate]. This gift may be merged with any of the investment assets of Children’s Home Society of Washington, but it shall be identified in the books and records of Children’s Home Society of Washington as an endowed fund named for [name of donor or other specified individual]. Distributions from the endowed fund shall be used for the [general or specific purpose].

The amount required to establish a named endowed fund varies among the different types of purposes for which funds can be established. Before including such a provision in your will, please contact Children’s Home Society of Washington to ensure that the amount of the bequest is sufficient to fulfill your intentions. (Note: When a donor executes a will containing language directing that a named endowed fund be established, no other documentation is required. Nevertheless, the donor is encouraged to execute an endowed fund agreement in addition to the will.)

### **Power to Vary Provision**

It is recommended that the following paragraph be added if the bequest is for a restricted purpose or to establish a named endowed fund.

“If, in the opinion of the Board of Trustees of Children’s Home Society of Washington it should become impossible, inadvisable, or impractical to use this gift the specified purpose(s), then the Board may in its discretion use the gift for other purposes, keeping in mind the original wishes of the donor. In any such alternative application, the support provided by this bequest shall be clearly identified with my name.”

*Bequests are vital to the future of Children’s Home Society of Washington (CHSW). When CHSW is named in a will or other estate planning instrument, we always appreciate receiving a copy of the relevant portion of the document. This not only helps us plan for the years ahead but also enables us to spot any potential problems with the bequest ahead of time. Copies may be sent to:*

Jim Laugen  
Vice President, Resource Development  
Children’s Home Society of Washington  
3300 NE 65<sup>th</sup> Street  
Seattle, WA 98115

For further information or if you have questions about the proper designation of a bequest, please contact Jim Laugen at (206) 695-3205 or 1-800-456-3339

*The information on this website does not constitute legal, financial, tax or estate planning advice and should not be relied upon as a substitute for such advice. Children's Home Society of Washington encourages you to seek the counsel of your own professional advisors and values their involvement as you determine how you would like to proceed.*