

Express Your Personal Wishes.

It may have started the first time we took a deep breath and blew out the candles, or perhaps it was when we gazed upon a lone star in a dark sky. We would quietly make a wish and take care to tell no one in hopes that the wish would come true.

Whenever it began, the practice of keeping our most personal hopes and dreams to ourselves is a tradition that Americans, in large number, tend to revive when it comes to a final communication with friends and loved ones.

This final communication is called The Last Will and Testament. Regardless of how we've come to view this document, it is a final opportunity to give expression to personal wishes.



I have reviewed your brochure on Wills and Bequests and:

- I would like to speak with someone who can provide additional information.
- I would like to receive information on other charitable tax planning options.

Name _____

Street _____

City _____

State/Zip _____

Home Phone _____

Work Phone _____

Email _____

*(Please complete and return to the address listed below.
All inquiries are treated with complete confidentiality).*

Will Your Will Be Known?



Making Your Wishes Known Through a Will

Do You Need a Will?

Many people, especially young individuals and those who feel that their estate is too small, believe that a will represents an unnecessary expense. But, you need a plan for the future and the preparation of a will need not be expensive.

Even if you don't own a lot of property, a will is needed to make other important decisions:

- **Naming an executor**
- **Naming a legal guardian for minors**
- **Making gifts or transfers**
- **Reducing estate tax liability**

In the absence of a will, the state will resort to a formula. A judge will name an executor, a bond may have to be posted, the court will name a guardian and a formula will determine asset distribution.

The Charitable Bequest

The charitable bequest is one of the best ways for you to express your specific philanthropic goals. In fact, the bequest is the most frequently utilized method to support charity in America.

Here are some options for your bequest to charity:

- **A specific dollar amount**
- **A percentage of the estate**
- **Specific assets**

Your gift is important to us! While many may think philanthropy is reserved for a select few, the truth is that every bequest to this organization helps us continue our work.

If you would like more information on wills, we invite you to use the reply form or contact us directly.

Sample Bequest Language

Please feel free to change the numbers or percentages as you desire.

1. Bequest of cash

"I bequeath the sum of \$10,000 to [Organization, Address, City, State, Tax ID number]."

2. Bequest of a percent of the estate

"I devise and bequeath 20% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to [Organization, City, State]."

3. Contingent Bequest

"If my brother John Doe survives me, I devise and bequeath 20% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to John Doe. If John Doe does not survive me, then I devise and bequeath 20% of my residuary estate, whether real or personal property and wherever located to [Organization, City, State]."

States mail in a sealed envelope to the messenger or telegram, the notice shall be by messenger service or the

The Last Will and Testament
Of