



## Sample Bequest Language

Leaving a gift to Concordia to benefit its people, programs or facilities through your will or living trust (referred to a "bequest") is an easy and impactful way to benefit our mission. When making a bequest, you can choose to support a specific facility, program, or a specific fund such as our Good Samaritan Endowment Fund, a Staff Appreciation Fund, or Activities Fund. The Concordia Lutheran Ministries Foundation is the official fundraising agent for Concordia and is the preferred designee for estate gifts.

The sample language provided below illustrates how a bequest can be accomplished, and is intended to be used for educational purposes rather than as legal advice. We encourage donors to share this information with their legal counsel. We also recommend that you review your bequest with Concordia's Development Office to ensure that your plans are carried out as you wish.

A bequest can be a simple addition to an existing will, created with a codicil (a document that amends, rather than replaces, a previously executed will). If you do not yet have a will, then the bequest can be written in when the will is created.

Here are some samples of bequest language.

### **For an unrestricted bequest (to be used where the need is greatest):**

"I hereby give and bequeath \_\_\_\_% of my estate [or] \$\_\_\_\_ of my estate to the Concordia Lutheran Ministries Foundation, for the specific benefit of Concordia [facility/campus name], with an address of [\_\_\_\_], to be used for its general purposes and/or where the need is greatest."

### **For an unrestricted residuary bequest (after leaving designated bequests to family, friends and/or other charities):**

"I give all the rest, residue, and remainder of my estate, both real and personal, to the Concordia Lutheran Ministries Foundation, for specific support of Concordia [facility/campus], with an address of [\_\_\_\_], to be used for its general purposes and/or where the need is greatest."

### **For a restricted bequest (to be used for a specific purpose within Concordia):**

“I hereby give and bequeath \_\_\_\_% of my estate [or] \$\_\_\_\_ of my estate to the Concordia Lutheran Ministries Foundation, for specific support of Concordia [facility/campus], with an address of [\_\_\_\_], with a preference for use as follows [\_\_\_\_]. If at any time, in the judgment of Concordia, it is impossible or impracticable to carry out the designated purpose, then Concordia shall determine an alternative purpose as near as possible to my original intent.”

If a donor wishes to give a restricted bequest to Concordia, he or she is encouraged to discuss the restriction with the Chief Development Officer within the CLM Foundation office, in order to ensure that the restrictions are in keeping with the Concordia’s mission, and are able to be carried out according to a donor’s wishes.

### **Beneficiary Designation**

When naming a Concordia facility, program or fund (via the CLM Foundation) as a beneficiary of your retirement plan, IRA, life insurance policy, charitable trust or charitable gift annuity, please use the following information on your beneficiary designation form.

### **Concordia Lutheran Ministries Foundation**

134 Marwood Road \* Cabot, PA 16023

Federal Tax ID Number: 20-5138266

### **More Information**

If you or your attorney would like Concordia to provide you with additional information that is specific to your goal and interest, please contact us at (724) 352-1571 ext. 8291.