

Sample Bequest Article

Step 1. Choose a title or make up your own:

Bequests: Investments in the Future
Creating Your Legacy
Setting the Example for Future Generations
A Simple Way to Give

Step 2. Insert your own names where indicated.

Step 3. Add photos – people love pictures.

Step 4. Use this article over and over and make it new every time, sometimes it's a sidebar, sometimes use excerpts, etc. Quote different people.

(*Charity Name*) is well served by friends who include provisions for the charitable organization in their wills and estate plans.

“At (*Charity Name*), we feel that a bequest is a profound act of love and confidence in our institution,” explains (*CEO or Board Chair Name, Title*). “In the same spirit of compassion that is the hallmark of service at (*Charity Name*), we steward bequests toward the goal of excellence in (*Mission description*).”

By naming (*Charity Name*) as the beneficiary for a bequest, a donor is assured that their gift will help provide the most advanced medical services possible to thousands in this region.

A bequest is one of the simplest ways to make an investment in (*Charity's Name*) future and it costs the donor nothing now. It may even offer estate tax advantages when carefully prepared by an attorney.

Anyone who lets us know that they have named (*Charity Name*) as beneficiary of their will or estate plan is automatically included in the (*Name of Legacy Society*). The Society is our way of thanking benefactors now, during their lifetimes, for their investment in the future of (*Charity Name*), says (*Executive or Board Chair, Title*).

If you would like more information about including (*Charity Name*) in your will or estate plan, please call (*contact person and phone*) or email us at (*email address*).

Ways to Join (*Name of Legacy Society*)

- Include a provision in your will or estate plan
- Name (*Charity Name*) as owner or beneficiary of a life insurance policy or beneficiary of an IRA or other type of retirement plan
- Charitable gift annuity
- Charitable remainder or lead trust

___ I have already included (*Charity Name*) in my will or estate plan.

___ I would like someone to contact me about joining the (*Name of Legacy Society*).

Name

Phone (Please indicate day or evening)