

# GIVING TOMORROW

## Sample Will or Trust Gift Language



Giving to your church or favorite ministry/charity through your will or trust is an effective and efficient way to make an impactful gift that underscores what is important to you.

You can make a gift through your will or trust in several ways:

### 1. A Gift of a Specific Amount or Specific Item

#### Specific Amount

I give \_\_\_\_\_ dollars (\$\_\_\_\_\_) to [charity name], a [charity's state] nonprofit corporation currently located at [charity's address], Federal Tax ID: [charity's tax id number or EIN], for its unrestricted use.

#### Specific Item or Personal Property

I give [description of item or property] to [charity name], a [charity's state] nonprofit corporation currently located at [charity's address], Federal Tax ID: [charity's tax id number or EIN], for its unrestricted use.

### 2. A Percentage Gift (of your estate or probate assets)

I give \_\_\_\_\_% of my net estate to [charity name], a [charity's state] nonprofit corporation currently located at [charity's address], Federal Tax ID: [charity's tax id number or EIN], for its unrestricted use.

### 3. A Gift of Specific Real Estate

I give all of my right title and interest in the real property located at [street address] more fully described as: [legal description] to [charity name], a [charity's state] nonprofit corporation currently located at [charity's address], Federal Tax ID: [charity's tax id number or EIN], for its unrestricted use.

### 4. A Gift of What's Left - A Residual Gift

I give [all OR %] of the rest, residue and remainder of my estate to [charity name], a [charity's state] nonprofit corporation currently located at [charity's address], Federal Tax ID: [charity's tax id number or EIN], for its unrestricted use.

### 5. Loved Ones First - A Contingent Gift

If [named primary beneficiaries] do not survive me, then I give \_\_\_\_\_ dollars (\$\_\_\_\_\_) OR \_\_\_\_\_% of my net estate OR [description of item or property] to [charity name], a [charity's state] nonprofit corporation

currently located at [charity's address], Federal Tax ID: [charity's tax id number or EIN], for its unrestricted use.

## **Don't forget to plan your beneficiaries.**

Having a will or trust in place is a great first step, but **you still have non-probate assets that a standard will does not cover.** Non-probate assets may include your IRAs, 401(k), other retirement plan, life insurance policies, and certain bank and brokerage accounts depending on how they were set up.

You can name your church or favorite ministry/charity as a beneficiary of a specific amount, a percentage, or as a contingent beneficiary of your specific non-probate asset. When making a beneficiary designation, please include the following information to ensure your gift is realized:

**Charity's Name**  
**Charity's Address**  
**Charity's Tax ID/EIN**

This Sample Will or Trust Gift language information is for illustration purposes only and is not intended to provide or be relied on for legal advice. Please consult your own, independent attorney for assistance.



**GIVING DESIGN, LLC**  
Forging *connections*. Building *legacies*.

