

Sample Language for Bequests

A charitable bequest is simply a distribution from your estate to a charitable organization through your last will and testament. There are different kinds of bequests. For each, you must use very specific language to indicate the precise direction of your assets, and to successfully carry out your final wishes.

Below, we have listed some of the more common kinds of bequests, and some bequest language. We always recommend that you carefully review the terms of your will with a professional trained in handling trusts and estates.

General Bequests are legacies left to certain people or causes that come from the general value of the estate, and are made by designating a specific dollar amount, a particular asset or a fixed percentage of your estate to the cause of your choice.

General bequest language:

"I give, devise, and bequeath to Missoula Area Agency on Aging located at 337 Stephens Ave, Missoula, MT 59801 (DBA: Missoula Aging Services, Tax ID 81-0379543), the sum of \$_____ (or a description of the specific asset), for the benefit of Missoula Area Agency on Aging and its general purposes."

Specific Bequests are made when a particular item or property is bequeathed for a designated purpose. (i.e., fund are to be used specifically for the Meals On Wheels program, or general operating expenses.)

Specific bequest language:

"I give, devise, and bequeath to Missoula Area Agency on Aging located at 337 Stephens Ave, Missoula, MT 59801 (DBA: Missoula Aging Services, Tax ID 81-0379543), the sum of \$_____ (or a description of a specific asset), for the benefit of Missoula Area Agency on Aging to be used for the following purpose: (state the purpose). If at any time in the judgment of the trustees of Missoula Area Agency on Aging it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose."

Residuary Bequests are made when you intend to leave the residue portion of your assets after other terms of the will have been satisfied.

Residuary bequest language:

"All the rest, residue, and remainder of my estate, both real and personal, I give to Missoula Area Agency on Aging located at 337 Stephens Ave, Missoula, MT 59801 (DBA: Missoula Aging Services, Tax ID 81-0379543), for its general purposes."

Contingency Bequests allow you to leave a portion of your estate to a particular charity if your named beneficiary does not survive you.

Contingency bequest language:

"I devise and bequeath the residue of the property, real and personal and wherever situated, owned by me at my death, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I devise and bequeath my residuary estate to Missoula Area Agency on Aging located at 337 Stephens Ave, Missoula, MT 59801 (DBA: Missoula Aging Services, Tax ID 81-0379543), for its general purposes."

If you have named Missoula Aging Services in your will, please let us know that you have joined like-minded individuals of the MAS Legacy Society. Thank you!

Please contact Missoula Aging Services' Development Director, Kathryn Hungerford at 406-728-7682 or khungerford@missoulaagingservices.org with any questions.