

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.

If you'd like help getting started on your plans and legacy, you can use [FreeWill, an online tool that guides you through the process of creating your will or trust](#). It's easy to use, accessible online, and can be completed in 20 minutes. You can use [this resource](#) on its own, or use it to document your wishes before finalizing your plans with an attorney.

If you have named Missoula Aging Services in your will, please contact us or [fill out this form to let us know!](#) We would love to thank you for your generosity.

- **General Bequests** are gifts 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), _____% of my total estate [or \$_____, or a description of the specific asset], for the benefit of Missoula Area Agency on Aging and its general operating."

- **Specific Bequests** are made when a particular item or property is bequeathed for a designated purpose. (i.e., funds are to be used specifically for the Meals on Wheels program.)

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), _____% of my total estate [or \$_____, or a description of the 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 rest of your assets after your other wishes in the will have been met.

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 operating."

Please contact Missoula Aging Services Development Officer Emily Landsiedel at 406-728-7682 or emilandsiedel@missoulaaging.org with any questions.

- **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."

- **Endowment Bequests** allow you to leave a portion of your estate to Missoula Aging Services' permanent endowment. An endowment is a permanent fund where the principal is invested, and the earnings help sustain our mission year after year:

Endowment bequest language:

"I leave _____% of my total estate [or \$_____, or a description of the specific asset] to Missoula Area Agency on Aging located at 337 Stephens Ave, Missoula, MT 59801 (DBA: Missoula Aging Services, Tax ID 81-0379543), for Missoula Aging Services' permanent endowment."

Thank you for choosing to take care of older adults and their caregivers as part of your life's legacy. By including Missoula Aging Services in your will, you ensure that future generations will continue to find comfort, connection, and support when they need it most. Your generosity today creates a lasting impact that will be felt for years to come.