

## SAMPLE BEQUEST LANGUAGE

- I. **Specific Bequests:** “I give, devise and bequeath the sum of \_\_\_\_\_ Dollars (\$\_\_\_\_) to St. Vincent Healthcare Foundation (tax identification number 81-0468034), a charitable corporation organized under Montana law maintaining its headquarters in Billings, Montana, . . .
  - A. Unrestricted  
“ . . . for the general support of St. Vincent Healthcare.”
  - B. Restricted  
“ . . . to be used to \_\_\_\_\_ (purchase equipment, fund a department or provide educational scholarships)
  - C. Restricted and endowed (that is, restricted to a specific purpose and established in a perpetual fund that spends only the income earned; requires a minimum gift amount, which is \$10,000; please call the Office of Planned Giving to discuss your plans for a restricted endowed fund)  
  
“ . . . to establish the John & Mary Doe Scholarship Endowment Fund” at St. Vincent Healthcare, the income from which shall be used for scholarship support for nurses, as determined by the hospital.”
- II. **Residuary Bequest:** I give, devise and bequeath to St. Vincent Healthcare Foundation (tax identification number 81-0468034), a charitable corporation organized under Montana law maintaining its headquarters in Billings, Montana, the rest, remainder and residue of my estate, both real and personal, and wherever situated.
- III. **Percentage Bequest:** I give, devise and bequeath to St. Vincent Healthcare Foundation (tax identification number 81-0468034), a charitable corporation organized under Montana law maintaining its headquarters in Billings, Montana, \_\_\_\_\_% of the rest, remainder and residue of my estate, both real and personal, and wherever situated.
- IV. **Contingent Bequest:** In the event that (name or names; i.e., spouse, children, sibling, heirs) shall not survive me, or shall die during the administration of my estate, within \_\_\_\_\_ days from the date of my death, or as a result of a common disaster, then I give, devise and bequeath the shares of those deceased beneficiaries, to St. Vincent Healthcare Foundation, (tax identification number 81-0468034), a charitable

corporation organized under Montana law maintaining its headquarters in Billings, Montana.

**Regarding Legal Advice:** This suggested bequest language is provided to you for your information and your attorney's use. It is not intended as legal advice; your will should be prepared by an attorney competent in estate planning. We urge you to discuss your estate and tax situation with your attorney to ensure that your bequest meets your personal and financial goals.

With a bequest for a restricted purpose, it is advisable to include language such as the following to enable the Foundation to use the bequest despite changed conditions:

"If, in the opinion of the President and the Foundation Board, all or part of this fund cannot be usefully applied to the above purpose, St. Vincent Healthcare may use the same for any purpose that in the Foundation's opinion will most nearly accomplish my wishes and purposes."