

## **Sample Bequest Language**

**Specific Bequests** allow you to designate a percentage of your estate, a dollar amount, or specified assets as a gift to Foundations Health & Wholeness, Inc.

Sample language:

I give, devise, and bequeath \_\_\_\_\_. [state a % or \$ amount, or specific property or other asset] to Foundations Health & Wholeness, Inc., located in Green Bay, WI, to be used for its general purposes [or for a particular program or purpose, such as an endowment].

**Residual Bequests** allow you to designate the remaining residue of your estate as a gift to Foundations Health & Wholeness, Inc., after the payment of all expenses and specific bequests to other beneficiaries have been made.

Sample language:

I give, devise and bequeath to the Foundations Health & Wholeness, Inc., located in Green Bay, WI, all [or state a percentage] of the rest and residue of my estate to be used for its general purposes [or for a particular program or purpose, such as an endowment].

**All inquires are welcome and held in the strictest confidence.**

Foundations Health & Wholeness, Inc. is a 501 (c)(3) non-profit organization  
Location: 1061 W. Mason St, Green Bay, WI 54303  
Federal non-profit tax ID number is 39-1047205

This document is not and should not be construed as legal advice. Please consult an attorney or financial advisor when preparing your estate and other long-term planning documents.

To learn more about planned giving and how to join George's Legacy Circle, contact Kelly Nutty, Director of Development, at 920-437-8256 or [knutty@WeAreFoundations.org](mailto:knutty@WeAreFoundations.org).