**[Insert Your Congregation’s Name and Logo / Mission / Vision]**

**A gift in your will (Bequest)**

A charitable gift in your will is a meaningful way to support [Insert Congregation’s Name]. A ***charitable legacy gift, also called a charitable bequest,*** is a direction in your will that instructs your Executor(s)/Trustee(s) to leave one or more of your assets to a charitable organization(s). Leaving a gift in your will is easy.

The easiest way to have the greatest impact in meeting [Insert Congregation’s Name] needs in the future is to make an unrestricted gift. However, if you wish to designate your gift for a specific use, a member of our session or minister will be happy to discuss that option with you.

Please see our sample bequest language below.

**Professional advice**

[Insert Congregation’s Name and Address] strongly recommends that you seek professional advice to ensure your financial goals are considered, your tax situation reviewed, and that your legacy gift is tailored to your circumstances. [Insert Congregation’s Name] also recommends that you consult your lawyer or estate planner regarding the specific wording of any bequest.

***Sample bequest clauses***

###### These are sample clauses only. Your lawyer or estate planner should review any wording.

**Specific, unrestricted:**

I give, devise, and bequeath to [Insert Congregation’s Name] of [Insert Congregation’s Full Address] the sum of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to be used for any purpose(s) approved by the Session, Board of Managers, and/or Trustees. Or, if such congregation does not exist at the time of my death, to [Insert Other Option Here] (e.g. The Presbyterian Church in Canada).

**Specific, restricted with right to vary clause:**

I give, devise, and bequeath to [Insert Congregation’s Name] of [Insert Congregation’s Full Address], the sum of $\_\_\_\_\_\_\_\_\_\_\_\_ to be used for the following purpose(s)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. If [Insert Congregation’s Name] is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Session, Board of Managers, and/or Trustees. Or, if such congregation does not exist at the time of my death, to [Insert Other Option Here] (e.g. The Presbyterian Church in Canada).

**General % unrestricted:**

I give, devise, and bequeath to [Insert Congregation’s Name] of [Insert Congregation’s Full Address], \_\_\_\_% of the residue of my estate to be used for any purpose(s) approved by the Session, Board of Managers, and/or Trustees. Or, if such congregation does not exist at the time of my death, to [Insert Other Option Here] (e.g. The Presbyterian Church in Canada).

**General %, restricted with right to vary clause:**

I give, devise and bequeath to [Insert Congregation’s Name] of [Insert Congregation’s Full Address], \_\_\_\_% of my estate to be used for the following purpose(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. If [Insert Congregation’s Name] is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose(s) approved by the Session, Board of Managers, and/or Trustees. Or, if such congregation does not exist at the time of my death, to [Insert Other Option Here] (e.g. The Presbyterian Church in Canada).

**Residual contingent trust:**

Upon the death of the survivor of my (wife, husband, etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and my (son, daughter, etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, I direct my trustee to transfer and deliver the balance of the residue of my estate, including any undistributed income to [Insert Congregation’s Name] of [Insert Congregation’s Full Address] to be used for any purpose(s) approved by the Session, Board of Managers, and/or Trustees. Or, if such congregation does not exist at the time of my death, to [Insert Other Option Here] (e.g. The Presbyterian Church in Canada).

**Contact:** For further information, please contact [Insert the name of the person they should contact on Session or one of the other bodies of the congregation and/or the minister]

[Insert Congregation’s Name]

[Insert Congregation’s Full Address]

[City, Province, Postal Code]

Registered Charitable No. [Provide Your Congregation’s Number Here]