

STIMSON

MODEL BEQUEST LANGUAGE

The examples provided below illustrate some of the more common kinds of bequests, and some bequest language that you may choose to include in your will. We encourage you to carefully review any language or terms that you include in your will regarding a bequest to Stimson 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 The Henry L. Stimson Center in Washington, DC, the sum of \$_____ (or a description of the specific asset), for the benefit of The Henry L. Stimson Center and its general purposes."

Specific Bequests are made when a particular item or property is bequeathed for a designated purpose. (i.e., instruments bequeathed to the local school district for use in music education; dollar funds to be used in the operation of a school or church.)

Specific bequest language:

"I give, devise, and bequeath to The Henry L. Stimson Center in Washington, DC, the sum of \$_____ (or a description of a specific asset), for the benefit of The Henry L. Stimson Center to be used for the following purpose: (state the purpose). If at any time in the judgment of the trustees of The Henry L. Stimson Center 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 The Henry L. Stimson Center in Washington, DC, 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 The Henry L. Stimson Center in Washington, DC for its general purposes."

Without a will, there is no mechanism in place to make a bequest, so we advise you to take the necessary steps, in consultation with a professional advisor, to make sure that your personal wishes are granted. The checklist below may be helpful to you in getting this process started.

- Make a list of organizations or causes that you would like to support.
- Make a detailed list of your assets (financial, real estate, vehicles, jewelry, collectibles, musical instruments, etc.)
- Set up an appointment with your attorney and/or financial adviser, or planned giving officer at the organization you intend to support. These professionals will guide you through the process.

For more information about making a planned gift to the Stimson Center, please email us at giving@stimson.org.