

SUGGESTED FORMS OF BEQUESTS

When making or revising a will, a donor should obtain the assistance of an attorney. Members of National Consumer Law Center's Development Office will be pleased to work with you and your attorney to design an estate plan specifically tailored to your wishes. The following are suggested forms for making various types of bequests:

1. Outright Bequest in Will (unrestricted)

a. Specific Dollar Amount:

"I bequeath the sum of \$_____ to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 to be used or disposed of in its sole discretion as it deems appropriate."

b. Percentage Amount:

"I bequeath (_____ percent) of my estate to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 to be used or disposed of in its sole discretion as it deems appropriate."

c. Specific Property (Personal Property):

"I bequeath (describe property) to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 to be used or disposed of in its sole discretion as it deems appropriate."

d. Specific Property (Real Estate):

"I devise all of my right, title, and interest in and to real estate located at (give address and describe property) to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 to be used or disposed of in its sole discretion as it deems appropriate."

e. Share of or Entire Residue of Estate:

"I devise and bequeath (all) (_____ percent) of the remainder of my property to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 to be used or disposed of in its sole discretion as it deems appropriate."

2. Conditional Bequest in Will

Insert the conditional language in one or more of the above provisions. For example:

“If my husband (wife) does not survive me, I bequeath the sum of \$_____ to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 to be used or disposed of in its sole discretion as it deems appropriate.”

3. Restricted Use

If the gift to National Consumer Law Center is for a purpose other than an unrestricted use, insert the restriction in place of the words “to be used or disposed of as National Consumer Law Center in its sole discretion deems appropriate.” For example:

“I bequeath the sum of \$_____ to National Consumer Law Center, having a principal place of business at 7 Winthrop Square, Boston, MA 02110-1245, Federal tax identification number 04-2488502 for the following use:

“_____.”

In the event of a gift subject to a restriction, we suggest including one of the following provisions:

“However, I impose no legal or equitable obligation in this regard” or,

“If in the judgment of National Consumer Law Center it becomes, or is likely to become, impossible or impractical to accomplish the purposes of this gift, the income or principal, or both, may be used for such related purposes and in such manner as determined by National Consumer Law Center.”