

## Sample Bequest Language

Please note that gifts of this nature should be carefully considered in relation to your comprehensive financial and estate plans. We strongly recommend that you consult an attorney in the preparation of your will and to supervise its execution so as to comply with your state requirements. The following are examples for illustration only.

***When including a bequest provision in your will, always use the full legal name of the group you are designating the beneficiary, and make sure to provide the federal taxpayer identification number.***

**Our full, legal name is: Crossroads Fund.** \*It is helpful to specify that we are based in Chicago, IL.

**Our federal taxpayer identification number is: 36-3092907**

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### Different types of bequests:

#### Bequests for Unrestricted Purposes

Unrestricted gifts are to be used for the greatest need at the time, as determined by the Board of Directors of Crossroads Fund. A general unrestricted bequest greatly helps Crossroads Fund – to build our capacity to support more groups working for social and economic justice, to be flexible in our ability to respond to new and emerging issues as they come up, and to provide the community members who are involved in the fund, now and in the future, with the most input and engagement in the allocation of resources.

- For a bequest of securities, the possible language is: I give Crossroads Fund all of my shares of XYZ stock or mutual funds to be used for the benefit of Crossroads Fund, Chicago, Illinois, tax id# 36-3092907.
- For a bequest of cash, the possible language is: I give to Crossroads Fund the sum of (AMOUNT) to be used for the benefit of Crossroads Fund, Chicago, Illinois, tax id# 36-3092907.

If you do not want to specify the exact amount or nature of the intended gift, perhaps because the size of your future estate is difficult to estimate, a proportional bequest can be the best way to accomplish your goals. Crossroads Fund would receive a percentage of the estate or the residue of the estate after all other provisions have been met.

- Possible language: I give to Crossroads Fund \_\_\_\_\_% of my estate, or \_\_\_\_\_% of the rest, residue and remainder of my estate to be used for the benefit of Crossroads Fund.

#### Contingent Bequest

A contingent bequest takes effect only if the primary intention cannot be met (e.g. if the primary beneficiary does not survive the donor). This ensures that property will not be distributed to unintended beneficiaries.

- Possible language is: If (name of primary beneficiary) does not survive me, or shall die during the administration of my estate, or as a result of a common disaster, then I give to Crossroads Fund all of the rest, residue, and remainder of my estate, to be used for the benefit of Crossroads Fund.

#### Bequests for Restricted Purposes

If you would like to provide support for a specific field of interest that is supported by Crossroads Fund, then you can designate your bequest for that purpose. Specific guidelines govern the use of these types of funds, so we ask that you contact us to discuss your restricted gift. We are here to help you as you plan. Contact Executive Director, Jeanne Kracher, at 773.227.7676 or [jeanne@crossroadsfund.org](mailto:jeanne@crossroadsfund.org) for more information.

*Crossroad Fund is not rendering legal or tax advisory services. For advice and assistance in specific cases, the services of an attorney or other professional advisor should be obtained.*