

# Moose Charities Bequest Builder

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*~ A Three Step Process ~*

## **Build a Bequest – Leave a Legacy**

### **Benefiting Mooseheart, Moosehaven, or the Endowment Fund**

#### **I. Select the Fund You Wish to Benefit**

*I give to  
the:*

1. *Mooseheart/Moosehaven Endowment Fund*
  2. *Mooseheart Endowment Fund*
  3. *Moosehaven Endowment Fund*
  4. *Other (please call Moose Charities for additional information)*
- ...of Moose Charities, Inc. (Federal I.D. #36-3993740 with 501(c)(3)**

*exempt status) a charitable corporation organized and existing pursuant to the laws of the State of Illinois, with principal offices located at Mooseheart, Illinois,*

#### **II. Review and Select the Type Of Bequest(s)**

The following samples may be tailored to best suit your wishes:

##### **1. Unrestricted General Legacy**

...the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) for its general purposes.

##### **2. Gift for Specific Purpose**

...the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_), the net income therefrom shall be used for \_\_\_\_\_ (state purpose). If, in the future, it is the opinion of the corporate officers that all or part of the income of this gift cannot be usefully applied to such purpose, the corporate officers may use the same for any purpose that they deem will most nearly accomplish my wishes.

##### **3. Specific Legacy**

...the following specific assets (which can include securities, real estate interests such as a residence or land, tangible personal property including art, coin or stamp collections, antiques, etc.):

##### **4. Gift of Residuary Estate**

... the residue of the property owned by me at my death, real and personal and wherever situated.

##### **5. Contingent Gift of Residuary Estate**

...my residuary estate for its general purposes (including property owned by me at my death, real and personal and wherever situated), if my spouse, \_\_\_\_\_ (spouse's name), does not survive me.

##### **6. Amount Of Gift Dependent on Size of Estate**

... the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) or \_\_\_\_\_ percent of my adjusted gross estate as finally determined for federal estate tax purposes, whichever is the lesser.

### III. Add to Will, Codicil, or Retirement Plan

**Will** – The above language may be used directly in your will.

**Codicil** – A codicil is a simple document that may be used to easily amend an existing will. The following is typical language:

*I, \_\_\_\_\_ (your name), do hereby publish this as and for a codicil to my Last Will and Testament dated the \_\_\_\_ day of \_\_\_\_\_(month), \_\_\_\_\_(year). Anything to the contrary in my aforesaid Last Will and Testament notwithstanding, I hereby devise and bequeath...*

*(insert from above the name of the **Fund You Wish To Benefit**)  
(insert from above the **Type Of Bequest** you wish to make)*

*In all other ways I do hereby ratify and confirm my Last Will and Testament as heretofore published.*

*In witness whereof, I have hereunto set my hand and seal this \_\_\_\_\_ day of \_\_\_\_\_(month) \_\_\_\_\_ (year).*

\_\_\_\_\_(Seal)

*Signed, sealed, and published by the testator (testatrix) in the presence of each of us, and at the same time declared and acknowledged by him (her) to be a Codicil to his (her) Last Will and Testament, and thereupon we, at the request of the said testator (testatrix) and in his (her) presence and in the presence of each other, have hereunto subscribed our names as witnesses thereof.*

1. \_\_\_\_\_ Witness Signature  
2. \_\_\_\_\_ Witness Signature  
3. \_\_\_\_\_ Witness Signature

**Retirement Plan** – You can simply designate one of the above funds as a primary or secondary beneficiary of your retirement plan (including IRA, Keogh, tax-sheltered annuity, qualified pension, or profit-sharing plan). If you would like to give additional instructions on the use of the gift, you can do so through a notarized letter explaining your intentions. If you choose, Moose Charities can retain the letter on file for you, or it can be provided at the time the gift is disbursed.

*Please Note: The general information provided here or by any representative of Moose Charities is not presented as specific financial, legal, or tax advice for any individual. Consultation with your own professional advisor(s) is always recommended.*

**Please direct all correspondence and calls to:  
Moose Charities • Mooseheart, Illinois • 60539- 1100 • Telephone: 630-966-2200  
<http://www.MooseCharities.org/>**