

Bequest Language

The following is intended to help you and your attorney in drafting a bequest that meets your individual interests. As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding Partners In Health, be sure the organization's correct legal name appears in all final documents as:

"Partners In Health, a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number: 04-3567502."

A General Bequest of a stated sum of money may be worded:

"I give to Partners In Health, a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 04-3567502 [insert here the exact dollar amount]."

A Specific Bequest of a certain asset from your estate may be worded:

"I give to Partners In Health, a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 04-3567502, [insert here a description of the particular property]."

A Residuary Bequest, after other bequests and expenses have been paid, may be worded:

"I give to Partners In Health, a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 04-3567502, all [or a portion] of the rest, residue and remainder of my estate."

A Contingent Bequest if the Testator is not survived by certain individuals:

"If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to Partners In Health, a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 04-3567502, [insert here the exact dollar amount, description of property, or percentage of residual estate]."

NEXT STEPS:

To receive further information and assistance on charitable gift annuities please contact our Gift Planning Office:

call (857) 259-1989

email giftplanning@pih.org