

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) 880-5717

email giftplanning@pih.org

Benefits: *

- **Flexible.** assets remain in your control should you need them.
- **Easy to arrange.** doesn't require a change to your will.
- **Revocable.** you can change your gift designation at any time.
- **Tax-wise.** funds passing by beneficiary designation to Partners In Health are not subject to income or estate tax. This means 100% of your gift is available for use by PIH, as you direct.
- **Family-friendly.** you can name family or other loved ones to benefit from some of the asset, with PIH receiving the remaining portion.
- **Support your cause.** your gift helps ensure PIH has the resources it needs to fulfill its mission and serve future generations.