



A Guide to Your Will – Making a Bequest to PA Connecting Communities

SAMPLE WORDING FOR BEQUESTS

When making or revising a will, you should obtain the assistance of an attorney. PA Connecting Communities (PACC) staff 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 to PACC.

OUTRIGHT BEQUEST IN WILL (UNRESTRICTED)

The following provision in your will creates an unrestricted bequest, which assures that your gift will be used where it is most needed.

Specific dollar amount:

“I bequeath the sum of \$_____ to PA Connecting Communities (PACC), a Pennsylvania nonprofit corporation having a principal place of business at 800 North Bell Avenue, Building 6 Suite 200, Federal Tax ID # 20-1118762, to be used or disposed of as PA Connecting Communities in its sole discretion deems appropriate.”

Percentage amount:

“I bequeath the sum of (___ percent) of my estate to PA Connecting Communities (PACC), a Pennsylvania nonprofit corporation having a principal place of business at 800 North Bell Avenue, Building 6 Suite 200, Federal Tax ID # 20-1118762, to be used or disposed of as the PA Connecting Communities in its sole discretion deems appropriate.”

Share of or entire residue of estate:

“I devise and bequeath (all) (___ percent) of the remainder of my property to PA Connecting Communities (PACC), a Pennsylvania nonprofit corporation having a principal place of business at 800 North Bell Avenue, Building 6 Suite 200, Federal Tax ID # 20-1118762, to be used or disposed of as the PA Connecting Communities in its sole discretion deems appropriate.”

A copy of the official registration and financial information may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

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 [or other condition], I bequeath the sum of \$_____ to PA Connecting Communities (PACC), a Pennsylvania nonprofit corporation having a principal place of business at 800 North Bell Avenue, Building 6 Suite 200, Federal Tax ID # 20-1118762, to be used or disposed of as the PA Connecting Communities in its sole discretion deems appropriate.”

RESTRICTED USE

You may want to designate your gift for some special purpose within the scope of PACC’s mission.

You can restrict the use of the principal, income, or both in this fashion:

“I bequeath the sum of \$_____ to PA Connecting Communities (PACC), a Pennsylvania nonprofit corporation having a principal place of business at 800 North Bell Avenue, Building 6 Suite 200, Federal Tax ID # 20-1118762, for the following use: _____.”

If you designate your bequest for a specific purpose, we request that you include the following will provision to ensure that your gift will continue to provide for the PACC’s needs. For example:

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

or

“If in the judgment of the PA Connecting Communities 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 PA Connecting Communities.”

CONTACT INFORMATION

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