

# SAMPLE WORDING

## for Legacies and Bequests to Animal Alliance

### **Unrestricted Bequest**

I bequeath to Animal Alliance, Inc. (AA, Inc.) whose Animal Alliance is located at \_\_\_\_, the sum of \$\_\_\_\_\_ or \_\_\_\_\_% of my residuary estate (or an accurate description of securities, real estate or other property given) to be used for the general purposes of the said organization.

### **Restricted Bequest**

I bequeath to Animal Alliance, Inc. (AA, Inc.) whose Animal Alliance is located at \_\_\_\_, the sum of \$\_\_\_\_\_ or \_\_\_\_\_% of my residuary estate (or an accurate description of securities, real estate or other property given). This gift shall be used for \_\_\_\_\_ (here describe in broad general terms the desired purpose or division).

### **Escape Clause**

In the case of a restricted gift it is wise to include a saving or escape clause so that your gift can continue to be useful to AA, Inc. if conditions change in a way that would nullify or make impractical the original purpose.

If, in the opinion of the Shelter Trust Trustees and the Board of Directors of KRS, Inc., all or part of the remainder of this bequest cannot be usefully applied to the above purpose, they may use the same for any purpose within the general powers of the organization which in their opinion will most nearly accomplish my wishes and purposes.

### **Contingent Bequest**

A contingent bequest provides first for family and friends. It benefits AA, Inc., only if other heirs do not survive.

If any of the above named beneficiaries should predecease me, then I bequeath to Animal Alliance, Inc., whose Animal Alliance is located at \_\_, all property, real or personal, which said beneficiary or beneficiaries would have received if said beneficiary or beneficiaries would have survived me.

### **Animal Care Provision**

In return for the humane care, relocation and resolution of any animal belonging to me at my death, I hereby bequeath a gift or additional gift to Animal Alliance, Inc., whose Animal Alliance is located at \_\_, (here describe the details of the gift and any specific desires for the animal(s)).

### **Testamentary Trust**

Declares that part or all of an estate be left in trust, with the income or some stated amount to be paid to one or more beneficiaries. Upon the death of the surviving beneficiaries, the principal will be paid to AA, Inc.

### **Other Trust Information**

Individually managed trusts whose yields provide for the donor or other beneficiaries for life or for a stated time and also benefit AA, Inc., vary widely in planning and wording.