



SUGGESTED FORMS OF BEQUESTS

When creating or amending a will or trust, you should consult with an attorney for legal advice and guidance. The Make-A-Wish® America Planned Giving Office will be pleased to work with you and your attorney to assure that your gift intent is honored.

The following are *sample* forms for making various types of bequests:

1. Outright Bequest

(a) Specific distribution of a dollar amount:

"Upon my death, I give \$_____ to the Make-A-Wish Foundation of [America or Chapter Name], [Address], outright and free of trust, to be used or disposed of as its Board of Directors deems appropriate in its sole discretion."

(b) Specific distribution of personal property:

"Upon my death, I give [Description of Property] to the Make-A-Wish Foundation of [America or Chapter Name], [Address], outright and free of trust, to be used or disposed of as its Board of Directors deems appropriate in its sole discretion."

(c) Specific distribution of real property:

"Upon my death, I transfer all of my right, title and interest in and to the real property located at [Address], formally known as [legal description], to the Make-A-Wish Foundation of [America or Chapter Name], [Address], outright and free of trust, subject to or free and clear of all claims, liens, and encumbrances, to be used or disposed of as its Board of Directors deems appropriate in its sole discretion."

(d) Share or entire residue of estate:

"Upon my death, I give [all or __%] of the remainder of my estate to the Make-A-Wish Foundation of [America or Chapter Name], [Address], outright and free of trust, to be used or disposed of as its Board of Directors deems appropriate in its sole discretion."

2. Conditional or Restricted Bequest

(a) Conditioned on Survivorship:

If the bequest is conditioned, insert the conditional language in one or more of the above provisions. For example:

"Upon my death, if my spouse does not survive me, I give the sum of \$___ to the Make-A-Wish Foundation of [America or Chapter Name], [Address], outright and free of trust, to be used or disposed of as its Board of Directors deems appropriate in its sole discretion."

(b) Restricted to wishes

"I give the sum of [\$___/___%] to the Make-A-Wish Foundation of [America or Chapter], [Address], [Tax ID] to be used for activities directly related to granting wishes of children served by its territory. **If in the judgment of the Board of Directors of the Make-A-Wish Foundation of [America or Chapter] it becomes impossible to accomplish the purpose of this gift, the income and principal may be used for such similar purposes and in such manner as is determined by the Board of Directors in its discretion.**"

*language is 'outclause' in the event of wishes not available, or chapters realigned, etc. Suggested but not required

CONTACT INFORMATION

The information for Make-A-Wish Foundation® of America is:

4742 North 24th Street, Suite 400
Phoenix, AZ 85016
Federal Taxpayer/Employer Identification No.: 86-0481941

Planned Giving Office- (602) 792-3260

Nicole Powers, *Planned Giving Director*
npowers@wish.org

Mark Simonson, *Planned Giving Manager*
msimonson@wish.org

Caron Shutan, *Planned Giving Manager*
cshutan@wish.org

Tawni Nesheim, *Planned Giving Coordinator*
tnesheim@wish.org