

**Bequest Intention Form**

CONFIDENTIAL

**Fund Name:** \_\_\_\_\_

(if applicable)

Please use this form to share the details of your bequest intentions with Berkshire Taconic Community Foundation. In recognition of your disclosure, we will be honored to invite you to join our Legacy Circle, a select group of donors who have created a future gift intention to support the communities we serve.

**My/our estate plan designates Berkshire Taconic Community Foundation as follows:**

**1. \_\_\_\_\_ There is a bequest in my/our will or trust to benefit the Foundation**

- A specific dollar amount: \$ \_\_\_\_\_
- A percentage of my/our estate: \_\_\_\_\_%
- The residual of my/our estate

Enclosed is a copy of the relevant provision in my/our will

**2. \_\_\_\_\_ BTCF is a/the beneficiary of my IRA or other retirement plan**

**and/or**

\_\_\_\_\_ **BTCF is the beneficiary of:**

- A Charitable Remainder Trust
- A Life Insurance Policy
- A Financial or Investment Account

Currently, I estimate that this may result in a gift of: \$ \_\_\_\_\_

**I have a grants directive on file**       **Attached is my grants directive**

\_\_\_\_\_ I/We hereby give permission to the Foundation to use my/our name/Fund in its publications.

\_\_\_\_\_ I/We hereby choose to have my/our name(s) remain anonymous.

\_\_\_\_\_ I/We hereby give permission to the Foundation to use my/our name/Fund in its publications after my/our lifetime.

**Signed:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_ **Dated:** \_\_\_\_\_

**Signed:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_ **Dated:** \_\_\_\_\_  
(see other side)

**Berkshire Taconic Community Foundation**

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

## Contact Info

### Donor(s)

Name (s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Ph: \_\_\_\_\_ Cell: \_\_\_\_\_ Email: \_\_\_\_\_

### Attorney

Name/Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Work: \_\_\_\_\_ Cell: \_\_\_\_\_ Email: \_\_\_\_\_

### Financial Advisor

Name/Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Work: \_\_\_\_\_ Cell: \_\_\_\_\_ Email: \_\_\_\_\_

## Sample Bequest Language

The following provides typical language to include a charitable bequest in your will. Please consult with your attorney.

**1. Percentage:** “I give to Berkshire Taconic Community Foundation (or *name of fund*, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, \_\_\_\_\_% of my estate.”

**2. Specific:** “I give to Berkshire Taconic Community Foundation (or *name of fund*, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257” (Choose one or more that apply):

a. The sum of \$\_\_\_\_\_

b. \_\_\_\_\_ shares of stock in \_\_\_\_\_ Company

c. My real property commonly known as \_\_\_\_\_.

**3. Residual:** “I give to Berkshire Taconic Community Foundation (or *name of fund*, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, all the residue of my estate, including real personal property.”

**4. Contingent:** “In the event of the death of any of the beneficiaries, I give to Berkshire Taconic Community Foundation (or *name of fund*, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, \_\_\_\_\_ (a percentage, specific, or residual language as above).

## Berkshire Taconic Community Foundation

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