SAMPLE BEQUEST LANGUAGE

Over the years bequests to Berkshire Taconic Community Foundation have resulted in significant additions to the funds the Foundation manages. We provide donors and their advisors with sample language for their wills to facilitate this type of gift. We also encourage donors to consider naming the Foundation as a beneficiary of retirement plans.

You can direct your gift to a specific fund at BTCF, establish your own fund or you can set up a Legacy Fund to give after your lifetime.

Here are four examples of language to direct your gift to Berkshire Taconic Community Foundation.

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, PO Box 400, Sheffield, MA, ____% 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, PO Box 400, Sheffield, MA":
   (Choose one)
   a. The sum of $_____.
   b. _____shares of stock in _____Company, or
   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, PO Box 400, Sheffield, MA, 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, PO Box 400, Sheffield, MA":, ____. (percentage, specific, or residual language as above).

Have you already established your will? You can modify your will and direct a gift to Berkshire Taconic Community Foundation with a simple codicil.

Sample Codicil (Will Modification):
[date]

I, *[name]*, a resident of the *[city/state]* declare that this is the codicil to my last will and testament, which is dated *[date original signed]*.

I add or change said last will in the following manner:

[list with particularity all changes to the will. Reference each section number of the will and the specific language you will be affecting. Be as clear and precise as possible.]