



Suggested Bequest Language

A **bequest** is a gift of property (for example, cash, securities, artwork etc.) through a will to a particular beneficiary.

A **specific bequest** is where Casey House Foundation receives a specific piece or amount of property for example, a sum of money or other assets.

Specific Bequest - Sample Wording

“I direct my Estate Trustee(s) to transfer the sum of \$_____ or assets of equal value that I may own at the time of my death, to Casey House Foundation, to be used for the general purposes of Casey House Foundation at the discretion of the Casey House Foundation Board of Directors. I request that Casey House Foundation publicly recognize this as a gift on behalf of:
_____”

A **residual bequest** is where Casey House Foundation receives all or a fraction of whatever remains of your estate after all debts, taxes, administrative expenses and specific bequests have been paid or distributed.

Residual Bequest - Sample Wording

“I direct my Estate Trustee(s) to pay or transfer (all or ____ %) of the rest, residue and remainder of my estate to Casey House Foundation, to be used for the general purposes of Casey House Foundation at the discretion of the Casey House Foundation Board of Directors. I request that Casey House Foundation

publicly recognize this as a gift on behalf of: _____”

A **contingent bequest** only takes effect if the primary intention cannot be met (for example, if the named beneficiary does not survive the donor).

Contingent Bequest - Sample Wording

“If (name/s of primary beneficiary/ies) do/does not survive me, or shall die as a result of common disaster or within ninety (90) days from the date of my death, or as a result of a common disaster, I direct my Estate Trustees to pay or transfer \$_____ or all or _____% of the residues of my estate) to Casey House Foundation, to be used for the general purposes of Casey House Foundation at the discretion of the Casey House Foundation Board of Directors. I request that Casey House Foundation publicly recognize this as a gift on behalf of:
_____”

Sample Language is also available for Designated Gifts and Named Endowments

For More Information

Contact Tracy Hatten at 416-962-4040 ext. 4003 or thatten@caseyhouse.ca to discuss your particular situation and to ask any questions you may have about supporting us with a bequest.

This information and material is intended to provide general examples and reference tools for understating the way in which charitable gifts may be made to Casey House Foundation and is for illustration purposes only. Casey House Foundation does not give legal or financial advice.

Casey House Foundation strongly recommends donors review this information and material and consult with independent legal, financial and/or tax advisors. This will ensure you receive appropriate legal advice, your financial goals are considered, your tax situation reviewed and your legacy gift is otherwise tailored to your personal circumstances.