

SAMPLE BEQUEST LANGUAGE

A gift to Big Shoulders Fund in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

RESIDUAL BEQUEST LANGUAGE

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Big Shoulders Fund, located in Chicago, IL, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

SPECIFIC BEQUEST LANGUAGE

Naming Big Shoulders Fund as a beneficiary of a specific amount from your estate is easy:

I give and devise to Big Shoulders Fund, located in Chicago, IL, the sum of \$ _____ (or asset) to be used for its general support (or for the support of a specific fund or program).

CONTINGENT BEQUEST LANGUAGE

Big Shoulders Fund can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Big Shoulders Fund, located in Chicago, IL, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).



It takes Big Shoulders to carry a child's dreams.

Bequest Intention Form

CONFIDENTIAL

PLEASE DESCRIBE THE NATURE OF YOUR BEQUEST INTENTION (Please check any that apply)

_____	Will	_____	IRA
_____	Revocable "Living" Trust	_____	Life Insurance Policy
_____	Other Retirement Account		
_____	Other (Please describe)		

PLEASE PROVIDE HOW YOUR BEQUEST WILL BE PROVIDED (Please check the one that applies)

_____	Percentage	_____	Dollar Amount
-------	------------	-------	---------------

PLEASE PROVIDE AN ESTIMATE OF THE CURRENT VALUE OF YOUR BEQUEST

INTENTION:

_____	\$0-\$999,999	_____	\$5,000,000-\$9,999,999
_____	\$1,000,000-\$2,499,999	_____	\$10,000,000 or above
_____	\$2,500,000-\$4,999,999		

JOSEPH SOCIETY

_____ I/We would like to become members of the *Joseph Society*, which recognizes those donors who have made bequest intentions to the Big Shoulders Fund.

Please list my name as follows: _____

Note: Your bequest intention amount will never be publicly revealed, only the names of members of the Joseph Society will be made public.

_____ I/We prefer to remain anonymous and not become members of the *Joseph Society*.

In telling you of my intention, I do not intend to create any legal obligation to the Big Shoulders Fund either personally or for my estate. It is simply a statement of my present intentions and I have the right to change my plans at any time without any obligation to inform the Big Shoulders Fund of any changes. It is provided solely to assist the Big Shoulders Fund in its future development plans.

Full Name: _____

Address City State ZIP: _____

Signature: _____ **Date:** _____

Please return this completed form to Amelia Drozda in the Big Shoulders Fund via fax to 312.751.5325, email to adrozda@bigshouldersfund.org or mail to 212 W Van Buren, Suite 900 Chicago, IL 60607.