

SAMPLE GIFT PROVISIONS FOR WILLS AND TRUSTS



The provisions you will need in your Will or Trust for making a gift to the Foundation will depend upon the type of gift and your own circumstances. Perhaps the model provisions below will be helpful to your attorney.

Gift of a Specific Amount

"I give to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623), the sum of _____ dollars for its general purposes."

Gift of a Percent of the Estate

"I devise and bequeath __% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623)."

Contingent Gift

"If my (brother John Doe survives me, I devise and bequeath __% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to John Doe.) If (John Doe) does not survive me, then I devise and bequeath __% of my residuary estate, whether real or personal property and wherever located to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623)."

Residuary Gift

"All the remainder of my estate, I give to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623), for its general purposes."

Gift of a Specific Asset*

"I give to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623), my [insert accurate and complete description of asset to be given] for its general purposes."

Gift for a Specific Purpose*

"I give to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623), the sum of \$_____ [or __% of my estate; or the property described herein _____] for [insert description of specific purpose]."

Gift to Church Permanent Endowment Fund*

"I give to Midwest Methodist Foundation, located at 155 N. Wacker Dr. Suite 4250, Chicago, Illinois (EIN: 36-2317623), the sum of _____ dollars [or __% of my estate; or my _____] for its permanent endowment fund."

*It is advisable to check with the church regarding their acceptance of designations or restrictions.

It is always advisable to consult with a qualified estate planning attorney when drafting your will to ensure your wishes for your family and your church are properly documented.

Midwest Methodist Foundation, 155 N. Wacker Dr. Suite 4250, Chicago, IL 60606

312-803-4801 • contact@midwestmethodist.org • MidwestMethodist.org • MethodistGift.org