

Sample Bequest Wording

Specific, unrestricted:

I give, devise and bequeath to United Way of Greater Toronto the sum of \$_____ to be used for any purpose(s) approved by the Board of Trustees of United Way of Greater Toronto.

Specific, restricted:

I give, devise and bequeath to United Way of Greater Toronto the sum of \$_____ to be used for the following purpose(s) _____. If United Way of Greater Toronto is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Trustees of United Way of Greater Toronto.

General % unrestricted:

I give, devise and bequeath to United Way of Greater Toronto ___% of the residue of my estate to be used for any purpose(s) approved by the Board of Directors of United Way of Greater Toronto.

General %, restricted:

I give, devise and bequeath to United Way of Greater Toronto, ___% of my estate to be used for the following purpose(s) _____. If United Way of Greater Toronto is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose(s) approved by the Board of Trustees of United Way of Greater Toronto.

Residual contingent trust:

Upon the death of the survivor of my (wife, husband, etc.) _____ and my (son, daughter, etc.) _____, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to United Way of Greater Toronto to be used for any purpose(s) approved by the Board of Trustees of United Way of Greater Toronto.

Legal Name: United Way of Greater Toronto

Charitable Business Number: 119278216RR0001

For more information, please contact:

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Disclaimer: The material listed above is intended to provide general information and should not be construed as legal and/or other professional advice. The above should not be used without first reviewing it with your own legal or other professional advisors to determine its suitability for your unique estate planning situation.