



SAMPLE BEQUEST WORDING

Legal Information:

For CRA purposes, we file under Hellenic Heritage Fund, and indicate that we operate as Hellenic Heritage Foundation, bearing registration number 88776 9297 RR0001.

OPTION 1:

A **Residual Bequest** designates whatever remains of your estate after all debts, taxes, expenses, and all other bequests to your beneficiaries (including family and friends) have been fulfilled.

Example:

"I give, devise and bequeath to HELLENIC HERITAGE FUND, operating as HELLENIC HERITAGE FOUNDATION and bearing registration number 88776 9297 RR0001, all (or %) of the rest, residue, and remainder of my estate."

OPTION 2:

An **Unrestricted Bequest** permits you to direct your gift to the Foundation's General Fund which supports our Projects and initiatives as well as our operating expenses.

Example:

"I give, devise and bequeath to HELLENIC HERITAGE FUND, operating as HELLENIC HERITAGE FOUNDATION and bearing registration number 88776 9297 RR0001, the sum of \$..... (or%, or specific property (real estate, securities, etc.)) to be applied by to the areas of greatest need."

.../2



OPTION 3:

A **Restricted Bequest** permits you to direct your gift towards a specific purpose, project or initiative.

Please keep in mind that your gift may be realized many, many years from now and some major projects or endowments may either already be fully funded or cease to exist. We recommend that you use as broad wording as possible and we can assist you.

Example:

"I give, devise and bequeath to HELLENIC HERITAGE FUND, operating as HELLENIC HERITAGE FOUNDATION and bearing registration number 88776 9297 RR0001, the sum of \$..... (or%, or specific property (real estate, securities, etc.)) to be used for the following purpose:

list designation here _____

OPTION 4:

A **Contingent Bequest** takes place only if specific individuals do not survive you.

Example:

"If (name/s of beneficiaries) does not survive me, or shall die within 90 days from the date of my death, then I give to the HELLENIC HERITAGE FUND operating as HELLENIC HERITAGE FOUNDATION bearing registration number 88776 9297 RR0001, all of my estate."

We strongly encourage you to speak with your family and seek advice from your financial or legal advisors. We welcome you to choose the type of gift that best suits your needs and interests. We would be happy to work with you to make your gift the most personally satisfying to you.

We welcome the opportunity to meet with you to discuss your planned giving options. Please feel free to contact our office to obtain further information.

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