



# Bequest Pledge Form

## Leaving a *legacy*

### Yes, I want to leave a legacy!

I am committed to leaving a legacy beyond my lifetime by including a charitable bequest to the Bobby Jones Chiari & Syringomyelia Foundation (Bobby Jones CSF) in my will or living trust. I will execute the bequest by adding charitable language to my will.

*(See following page for types of bequests and sample language to include in will)*

### My Commitment

I intend to leave \$ \_\_\_\_\_ to the Bobby Jones Chiari & Syringomyelia Foundation for charitable purposes.

I intend to leave \_\_\_\_\_ % of my estate to the Bobby Jones Chiari & Syringomyelia Foundation for charitable purposes.

### My Charitable Impact

I will designate an unrestricted charitable bequest to be used for Bobby Jones CSF priorities as determined by the organization's leadership.

I wish to establish (or have already established) a permanent named fund with income going to the specific purpose of: \_\_\_\_\_.

Name(s) \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_

Email \_\_\_\_\_

Signature(s) \_\_\_\_\_

**Please share a copy of this form with your estate planning attorney. Bobby Jones CSF, a charitable organization under Section 501(c)(3) of the Internal Revenue Code, is exempt from federal income taxation. The tax identification number of Bobby Jones CSF is 26-1316274.**



**General Bequests** are legacies left to certain people or causes that come from the general value of the estate, and are made by designating a specific dollar amount, a particular asset or a fixed percentage of your estate to the cause of your choice.

**Sample general bequest language:**

*“I give, devise, and bequeath to the Bobby Jones Chiari & Syringomyelia foundation, Staten Island, New York, the sum of \$\_\_\_\_\_, from (a description of the account it is coming from) for the benefit of the Bobby Jones Chiari & Syringomyelia Foundation and its general purposes.”*

**Specific bequests** are made when a particular item or property is bequeathed for a designated purpose. (i.e., instruments bequeathed to the local school district for use in music education; dollar funds to be used in the operation of a school or church.)

**Sample specific bequest language:**

*“I give, devise, and bequeath to the Bobby Jones Chiari & Syringomyelia Foundation, Staten Island, New York, the (a description of a specific asset), for the benefit of the Bobby Jones Chiari & Syringomyelia Foundation to be used for the following purpose: (state the purpose). If at any time in the judgment of the trustees of the Bobby Jones Chiari & Syringomyelia Foundation it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose.”*

**Residuary Bequests** are made when you intend to leave the residue portion of your assets after other terms of the will have been satisfied.

**Sample residuary bequest language:**

*“All the rest, residue, and remainder of my estate, both real and personal, I give to the Bobby Jones Chiari & Syringomyelia Foundation, Staten Island, New York, for its general purposes.”*

**Contingency Bequests** allow you to leave a portion of your estate to a particular charity if your named beneficiary does not survive you.

**Sample contingency bequest language:**

*“I devise and bequeath the residue of the property, real and personal and wherever situated, owned by me at my death, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I devise and bequeath my residuary estate to the Bobby Jones Chiari & Syringomyelia Foundation, Staten Island, New York, for its general purposes.”*

The information above is general and is not intended to provide specific advice about the legal or tax implications of any specific planned giving vehicle.