

## **Sample Bequest Wording for a Will**

A charitable gift, made through a bequest in your Will, can have an extraordinary impact for the charitable organizations you choose to support beyond your own lifetime. Your lawyer, when preparing your estate documents, will seek to understand your charitable intent and will then document this in your Will. Sample bequest wording is provided here so you and your lawyer may consider both the various options when considering options for this gift.

### **For an unrestricted gift of a defined amount...**

I give to the Dartmouth General Hospital Charitable Foundation, located at 325 Pleasant St., Dartmouth, Nova Scotia, B2Y 4G8 the sum of \$\_\_\_\_\_ to be used at the Foundation's discretion.

### **For a restricted gift of a defined amount**

I give to the Dartmouth General Hospital Charitable Foundation, located at 325 Pleasant St., Dartmouth, Nova Scotia, B2Y 4G8 the sum of \$\_\_\_\_\_ to be used for \_\_\_\_\_. If the Dartmouth General Hospital Charitable Foundation is unable to apply all, or a portion of this gift for my intended use, the balance of my bequest may, at their discretion, be used by the Dartmouth General Hospital Charitable Foundation to advance the priorities of the organization.

### **For a gift of the residual of my estate**

I give to Dartmouth General Hospital Charitable Foundation, located at 325 Pleasant St., Dartmouth, Nova Scotia, B2Y 4G8 \_\_\_\_\_% of the rest, residue and remainder of my estate to be used by the Foundation to advance the priorities of the organization.

### **Of Special Note**

If your estate holds securities, including publicly listed stocks, bonds and mutual funds, there may be tax advantages to transfer a charitable gift in-kind using any of these securities rather than cash. You may wish to discuss this form of charitable giving with your lawyer, other advisors and your executor.