



Sample Bequest Language

The following language may help you with wording when you want to include the Catholic Foundation of North Georgia and its endowment funds or a Catholic entity in The Archdiocese of Atlanta in your will. This is not a substitute for legal advice. Please take this to your attorney to use in drafting your will or a codicil to your will. You may reach the Catholic Foundation at 404-497-9440.

Unrestricted Bequests

The simplest and most frequently used form of a charitable bequest under a will is an outright bequest of either a specific amount of cash or some other property with no restriction on the use of the gift by the recipient.

Bequest of Cash

I give and bequeath cash in the amount of \$X to The Catholic Foundation of North Georgia, Inc., Atlanta, Georgia (Taxpayer ID No. 58-2008930), or its successors and assigns, for its general purposes.

Bequest of Stock

I give and bequeath all of my shares of stock of ABC Corporation to The Catholic Foundation of North Georgia, Inc., Atlanta, Georgia (Taxpayer ID No. 58-2008930), or its successors and assigns, for its general purposes.

Bequest of Real Estate

I give, bequeath, and devise all of my real property located at 123 ABC Street, Atlanta, Fulton County, Georgia, to The Catholic Foundation of North Georgia, Inc., Atlanta, Georgia (Taxpayer ID No. 58-2008930), or its successors and assigns, for its general purposes.

Bequest of Percentage of Estate

Your charitable bequest may also take the form of a percentage or fraction of the residue of your estate, which is the portion of your estate remaining after the payment of taxes and other expenses and any bequests to other beneficiaries.

I give, bequeath, and devise X% of the rest and residue of my estate, of every kind and character and wherever situated, remaining after giving effect to the previous bequests in my will, to The Catholic Foundation of North Georgia, Inc., Atlanta, Georgia (Taxpayer ID No. 58-2008930), or its successors and assigns, for its general purposes.

Restricted Bequests

If you prefer your bequest be restricted to an endowment fund at the Catholic Foundation or to a particular use at a Catholic institution, the recipient in any of the forms of bequests described above may be replaced with one of the following:

Restricted to Existing Endowment Fund

... to The Catholic Foundation of North Georgia, Inc., Atlanta, Georgia (Taxpayer ID No. 58-2008930), or its successors and assigns, to be held in the ABC Endowment Fund.

Restricted to New Endowment Fund

... to The Catholic Foundation of North Georgia, Inc., Atlanta, Georgia (Taxpayer ID No. 58-2008930), or its successors and assigns, to be held as an endowment fund of perpetual duration, to be known as the ABC Endowment Fund, with the amount appropriated for expenditure from such fund (in accordance with the Catholic Foundation's policy on endowment funds) to be used for the general purposes of the XYZ Church.