



**FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY**

BEQUEST LANGUAGE

After providing for loved ones, donors may want to consider leaving a portion of their estate to the **West Suburban YMCA**, either to benefit its unrestricted fund or to benefit a particular charitable purposes (or more than one), or a field of interest. A charitable bequest is one of the easiest ways to make a lasting gift to the community. A bequest to the YMCA can easily be made through a simple designation in a will or trust.

A charitable bequest can dramatically reduce estate and inheritance taxes and typically generates tax savings that can be passed on to a donor's heirs. A bequest becomes a permanent legacy that will serve the community for generations to come. The YMCA's Boards of Directors and Trustees ensure that donors' wishes are carried out.

UNRESTRICTED SPECIFIC BEQUEST

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the West Suburban Young Men's Christian Association, Inc., tax identification # 04-2104783, a not-for-profit charitable organization located in Newton, MA 02458 for its general charitable purposes.

UNRESTRICTED PERCENTAGE BEQUEST

I give, devise and bequeath to the West Suburban Young Men's Christian Association, Inc., tax identification # 04-2104783, a not-for-profit charitable organization located in Newton, MA 02458, ____ % of the rest and residue of my estate for its general corporate purposes.

RESTRICTED BEQUEST

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the West Suburban Young Men's Christian Association, Inc., tax identification # 04-2104783, a not-for-profit charitable organization located in Newton, MA 02458, to be used for the following purpose:

(Please note: When creating a restricted bequest, please consult with the West Suburban YMCA's. Development Office to discuss the language and restriction that you are considering to make sure that it fulfills both your wishes and the YMCA's mission and strategic plan.)

BEQUEST TO CREATE A PERMANENT UNRESTRICTED FUND

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the West Suburban West Suburban Young Men's Christian Association, Inc., tax identification # 04-2104783, a not-for-profit charitable organization located in Newton, MA 02458, to establish the _____ Fund, to be held as a permanent fund and managed together with the West Suburban Young Men's Christian Association, Inc.'s other endowed funds. Grants from the Fund shall be made in accordance with the West Suburban Young Men's Christian Association, Inc.'s policies for such funds, and shall be used for unrestricted purposes.

BEQUEST TO CREATE A PERMANENT RESTRICTED FUND

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the West Suburban Young Men's Christian Association, Inc., tax identification # 04-2104783, a not-for-profit charitable organization located in Newton, MA 02458, to establish the _____ Fund, a permanent fund from which grants are to be made for the following purpose:

(Please note: When creating a restricted bequest, please consult with the West Suburban YMCA's Development Office to discuss the language and restriction that you are considering to make sure that it fulfills both your wishes and the West Suburban YMCA's mission and strategic plan.)

Adding a Measure of Flexibility

When drafting a bequest, especially one having a restricted purpose, it is helpful to add a "saving clause." This helps to ensure that West Suburban Young Men's Christian Association, Inc. may always apply the funds or property in a manner that will most closely meet the donor's original intention. Such a clause might read as follows:

"If, at any time, the Board of Directors of the West Suburban Young Men's Christian Association, Inc., acting in their sole discretion, determines that the stated use or purpose of this bequest shall no longer be necessary, advisable, feasible or desirable to carry out the mission of West Suburban Young Men's Christian Association, Inc. and its supported organizations, the Board of Directors shall have the authority to designate the fund created by this bequest for that purpose that they, in their sole discretion, determine to most closely carry out my original intention."

**The language is provided is for informational purposes only and
is not intended as legal, tax, or investment advice.
For such advice, please consult an attorney, tax professional, or investment professional**