

## **Suggested Bequest Language**

Below is suggested language when writing your will/trust. We recommend consulting a financial professional who can address your specific situation and wishes.

**General Bequest** I give all my real and personal property to the First Unitarian Church of Dallas, a Texas charitable corporation located at 4015 Normandy Ave, Dallas, TX 75205-105, for its unrestricted use.

**Specific Bequest** I give \_\_\_\_\_ [\$ amount, description of property, or % of estate] to the First Unitarian Church of Dallas, a Texas charitable corporation located at 4015 Normandy Ave, Dallas, TX 75205-1705 for its unrestricted use.

Give a specific asset or collection of assets in the form of cash, securities, or other property. Retirement plan benefits, IRAs, savings bonds, and other items known as “income with respect to a decedent” (IRD) are particularly tax effective gifts to charity. You may designate an amount or a percentage of the property.

**Residuary Bequest** I give all [or \_\_\_\_\_ %] of my remaining assets of any kind to the First Unitarian Church of Dallas, a Texas charitable corporation located at 4015 Normandy Ave, Dallas, TX 75205- 1705, for its unrestricted use.

Give all or a percentage of what remains of your estate after all specific bequests have been satisfied and debts and expenses have been paid. You may specify that charitable gifts be fulfilled first with IRD assets to the extent needed to reduce your tentative estate tax.

**Contingent Bequest** Give all or a portion of your estate in the event that a named beneficiary is not alive when you die. This type of bequest can avoid costly litigation or prevent property from reverting to the state for lack of heirs.

**Testamentary Charitable Remainder Trust** A special trust created during your lifetime, with a “pour-over” will to designate assets placed in a trust with the income paid to one or more beneficiaries for their lifetimes. Upon the death of the last income recipient, or after a term of a specified number of years, the trust terminates and assets are transferred to the First Unitarian Church of Dallas, completing your gift.

Tax laws change often. Please consult a financial professional to answer specific questions regarding your individual situation. For more information, please contact us:

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Dallas, TX 75205-1705  
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