



Dutchess County SPCA, Inc. Sample Bequest Language

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A bequest may be in the form of cash, securities, real estate, or other property. You should specify that the Dutchess County SPCA, Inc. receive a certain amount or percentage of your estate, particular assets, or the remainder of your estate after providing for heirs. To discuss making a bequest or for assistance in drafting language, please contact us.

Following are Some Examples of Various Types of Bequests:

Specific bequests are used to make gifts of a specific dollar amount or specific assets, such as securities, real estate, or personal property.

Residuary bequests are used to give all or a portion of the rest, residue, and remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.

Contingent bequests will result in gifts to the Dutchess County SPCA, Inc. only in the event of the death of other beneficiaries or the fulfillment of certain conditions described in your estate plans.

Suggested Language Example:

"I give, devise, and bequeath unto the Dutchess County SPCA, Inc. a charitable New York State organization, all of my residuary estate

OR

a portion of my residuary estate equal to ____% thereof

OR

the following described property _____

OR

the sum of _____"

Designating the Purpose of a Bequest

Unrestricted: The most useful type of bequest is unrestricted, allowing the funds to be "allocated by the Dutchess County SPCA, Inc. wherever the need is greatest."

Restricted: After consultation with the Dutchess County SPCA, Inc., you may designate your bequest to support a special program or purpose that reflects your personal or professional interest. If the bequest is restricted to a specific purpose, it is important that the following wording be added at the end of the provision. This will ensure that, in the remote possibility a program or specified purpose may cease to need funds in the future, an alternate use for the bequest may be determined. "..... for so long as the Board of Directors of the Dutchess County SPCA, Inc. determines that the need exists. Should the need no longer exist, said Board of Directors may, in its sole discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above."

Designation of the use of the funds bequeathed (devised, in the case of real property) can, or should, be as detailed as is felt necessary to describe adequately the desired use and purpose of the bequest.