

# Sample Bequest Clauses

## **A GIFT OF MONEY TO YOUR CONGREGATION**

I HEREBY DIRECT my Trustees to transfer and deliver to [name of congregation], or its successor body, the sum of XXX THOUSAND (\$xxx,000.00) DOLLARS for the general use of [congregation], as the Congregational Council in its sole discretion deems advisable. I declare that the receipt of the person with apparent authority to receive same shall be a sufficient discharge to my Trustees.

## **A DESIGNATED GIFT**

I HEREBY DIRECT my Trustees to transfer and deliver to [congregation], or its successor body, the sum of XXX THOUSAND (\$xxx,000.00) DOLLARS for the purpose of \_\_\_\_\_  
\_\_\_\_\_. I declare that the receipt of the person with apparent authority to receive same shall be a sufficient discharge to my Trustees.

I HEREBY DIRECT that in the event that unforeseen circumstances make the specified use of this bequest no longer practicable or desirable, the Congregational Council of [congregation] is hereby authorized to make any changes it may consider desirable, such changes, however, to be in keeping as far as possible with the spirit and general intent of the bequest.

## **A GIFT OF A PERCENTAGE OF YOUR ESTATE**

I HEREBY DIRECT my Trustees to transfer and deliver to [name of congregation], or its successor body, twenty percent (20%) of the residue of my estate for the general use of [congregation], as the Congregational Council in its sole discretion deems advisable. I declare that the receipt of the person with apparent authority to receive same shall be a sufficient discharge to my Trustees.

**A GIFT OF A PERCENTAGE OF YOUR REGISTERED ASSETS**

In the event that my spouse pre-deceases me, I HEREBY DIRECT my Trustees to transfer and deliver to [name of congregation], or its successor body, xx percent (xx%) of the value of any assets which I may own which are in a Registered Retirement Savings Plan, a Registered Retirement Income Fund, a Life Income Fund or a Locked-in Retirement Income Fund (the “Plans”) for the general use of [congregation], as the Congregational Council in its sole discretion deems advisable. Notwithstanding anything else contained in this my will it is my intent that for the purposes of the gift to [congregation] from such Plans, contained in this paragraph, such percentage shall be of the value of the assets in such Plans immediately prior to my death and prior to any incidence of tax on any such assets arising as result of my death. I declare that the receipt of the person with apparent authority to receive same shall be a sufficient discharge to my Trustees.

**MAKING THE CONGREGATION THE CONTINGENT BENEFICIARY OF ALL OTHER BEQUESTS**

I HEREBY DIRECT my Trustees that in case any bequest made by this Will shall by any reason of the death of a named beneficiary or any other reason lapse, the property so bequeathed shall be delivered, transferred and paid to [congregation], or its successor body, to be used by it in its sole discretion as it deems advisable. I declare that the receipt of the person with apparent authority to receive same shall be a sufficient discharge to my Trustees.

**DETERMINING THE SUCCESSOR OF YOUR CONGREGATION**

**(TO ACCOMPANY ALL OTHER CLAUSES)**

If it is necessary to determine the direct successor of said Congregation, I direct that such a decision be made by the Bishop of the Eastern Synod of the Evangelical Lutheran Church in Canada or his designate, or failing them by such other individual as may be designated by the Synod Council of such Synod, and the decision of the Bishop, his designate or such other individual as the case may be shall be final and binding on my Trustees and on all others concerned.