



Adding Partners for World Health to your Estate Plans

Bequest Benefits:

Bequests are a flexible gift option, as they can be revised or modified at any time. Bequests can be made for general purposes at the discretion of PWH or for a specific purpose to help ensure your charitable objectives are met. In addition, charitable bequests are exempt from federal estate taxes.

Types of Bequests and Sample Language:

There are a variety of ways to make a charitable bequest to PWH. You will need to speak to your attorney about making a charitable bequest and including PWH in your estate plan. Here are examples and sample language:

- **Specific Bequest:** A gift of a specific asset, such as real estate or property, or a specific dollar amount. For example, you may wish to leave \$10,000 or a vacation home to PWH.
 - “I hereby give, devise and bequeath [*DOLLAR AMOUNT or DESCRIPTION OF PROPERTY*] to Partners for World Health, a nonprofit organization located at 40 Walch Drive, Portland, ME, 04103, Federal Tax ID # 32-0276903, for Partners for World Health’s general use and purpose.
 - “I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at [*ADDRESS OR DESCRIPTION OF PROPERTY*] to Partners for World Health, a nonprofit organization located at 40 Walch Drive, Portland, ME, 04103, Federal Tax ID # 32-0276903, for Partners for World Health’s general use and purpose.
- **Percentage Bequest:** Another type of a specific bequest, where you leave a specific amount of your overall estate to charity. For example, you may wish to leave 10% of your estate to PWH.
 - “I hereby give, devise and bequeath [*__ percent __(%)*] of my total estate, determined as of the date of my death, to Partners for World Health, a nonprofit organization located at 40 Walch Drive, Portland, ME, 04103, Federal Tax ID # 32-0276903, for Partners for World Health’s general use and purpose.”
- **Residual Bequest:** A gift made from the balance of the estate after the specific bequests have been distributed. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 25% of your residual estate to PWH.
 - “I hereby give, devise and bequeath to Partners for World Health, a nonprofit organization located at 40 Walch Drive, Portland, ME, 04103, Federal Tax ID # 32-0276903, [*ALL or A PERCENTAGE OF*] the rest, residue or remainder of my estate to be used for Partners for World Health’s general use and purpose.”
- **Contingent Bequest:** A gift made to charity when the primary specific bequest cannot be met. For example, you could leave your home to a relative but the bequest language could state that if the relative is not alive at the time of your passing, the home would go to PWH.
 - “If (*PRIMARY BENEFICIARY*) does not survive me, then I hereby give, devise and bequeath to Partners for World Health, a nonprofit organization located at 40 Walch Drive, Portland, ME, 04103, Federal Tax ID # 32-0276903, [*DESCRIPTION OF PROPERTY*] to be used for Partners for World Health’s general use and purpose.”

Restricted Bequests

If you are considering making a charitable bequest to PWH and would like to designate it for a specific purpose, please contact us. We are happy to discuss meeting your charitable objectives and options should it become impossible for PWH to use the gift as originally designated.