

Legacy Giving: Statement of Intent & Sample Bequest Language

Part 1: Sample Bequest Language

The following language can be used by donors and their attorneys to include our organization in a will or living trust.

Gift Type	Sample Language
Specific Bequest (Fixed Amount)	"I give, devise, and bequeath to Literacy Services of Indian River County, Vero Beach, FL, 32960, Tax ID 59-1987210, the sum of \$_____ to be used for its general purposes."
Residuary Bequest (Percentage)	"I give, devise, and bequeath to Literacy Services of Indian River County, Vero Beach, FL, 32960, Tax ID 59-1987210, _____% of the rest, residue, and remainder of my estate to be used for its general purposes."
Contingent Bequest	"In the event that [NAME OF PRIMARY BENEFICIARY] does not survive me, I give, devise, and bequeath to Literacy Services of Indian River County, Vero Beach, FL, 32960, Tax ID 59-1987210], the sum of \$_____."

Part 2: Statement of Intent (Enrollment Form)

This form allows donors to notify us of their plans so we can recognize them as members of our Legacy Society. This is **not** a legally binding contract.

Donor Information

- **Name(s):** _____
- **Address:** _____
- **Email:** _____ **Phone:** _____

Gift Details

I/We have made provisions for a legacy gift to LITERACY SERVICES OF INDIAN RIVER COUNTY through my/our:

- Will or Living Trust
- Retirement Account (IRA, 401k, etc.)
- Life Insurance Policy
- Other: _____

Estimated Value (Optional): \$ _____ or _____%

Providing a value helps us plan for the future, but it is not required.

Recognition Preferences

- You may include my/our name(s) in the Legacy Society membership list.
- I/We prefer to remain anonymous.

Signature: _____ **Date:** _____