

PLANNED GIVING | YOUR GUIDE TO BUILDING A LEGACY

SAMPLE BEQUEST LANGUAGE

Adding a charitable bequest to your will is a simple and meaningful way to leave a legacy without impacting your current cash flow, lifestyle, or the security of your family. Bequests allow you to distribute assets to charity according to your wishes tax-free. You can gift cash or specific property, or a percentage of your estate.

SPECIFIC BEQUESTS

A **specific bequest** directs a dollar amount or particular assets such as securities, real estate, or property to CFGP.

I give and bequeath to the Catholic Foundation of Greater Philadelphia, 2133 Arch Street, Suite 400, Philadelphia, PA 19103 (Federal Tax ID #46-1566557) the sum of \$ _____ to be used for its general purposes [OR: for the purpose of a specific fund or program named here:_____.]

PERCENTAGE BEQUEST

A **percentage bequest** directs a specific percentage of your overall estate to CFGP.

I give and bequeath to the Catholic Foundation of Greater Philadelphia, 2133 Arch Street, Suite 400, Philadelphia, PA 19103 (Federal Tax ID #46-1566557) _____ % of my estate to be used for its top priorities [OR: for the purpose of a specific fund or program named here:_____.]

RESIDUAL BEQUEST

A **residual bequest** is made from the balance of an estate after all other specific bequests are already met, and all debt and other obligations are paid.

I give and bequeath to the Catholic Foundation of Greater Philadelphia, 2133 Arch Street, Suite 400, Philadelphia, PA 19103 (Federal Tax ID #46-1566557) ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for its top priorities [OR: for the purpose of a specific fund or program named here_____.]

Please contact CFGP Chief Philanthropy Officer Garrett Owen at 445-223-1997 or gowen@thecfgp.org for a confidential discussion about your charitable goals and giving options.

Visit TheCFGF.org/planned-giving to learn more.

This information does not constitute legal or financial advice. Consult your financial advisor and obtain professional counsel of an attorney to assist you in making a gift in a way that will benefit the people and organizations you care most about.