

## PLANNED GIVING: BEQUESTS

### Types of Bequests and Sample Wording

"I, [name], of [city, state, ZIP], give, devise and bequeath to Milwaukee Habitat for Humanity, (FEIN #xx-xxxxx), [written amount or percentage of the estate or description of property] for its unrestricted use and purpose."

<b>Outright Bequest</b>	<p>An <i>outright bequest</i> leaves a specific sum or property to Milwaukee Habitat for Humanity.</p> <ul style="list-style-type: none"> <li>▪ Expressed as a specific sum of money: <i>I give to Milwaukee Habitat the sum of \$_____.</i></li> <li>▪ Expressed as a specific asset or item: <i>I give to Milwaukee Habitat_____.</i></li> <li>▪ Expressed as a percentage: <i>I give to Milwaukee Habitat _____% of my estate.</i></li> </ul>
<b>Residuary Bequest</b>	<p>A <i>residuary bequest</i> is a bequest of all, or a portion, of your estate after other specific bequests have been made.</p>
<b>Contingent Bequest</b>	<p>A <i>contingent bequest</i> leaves your estate, or a percentage of your estate, to Habitat if your beneficiaries do not survive you.</p>
<b>Testamentary Life Income Gift</b>	<p>A <i>testamentary life income gift</i> is a plan where Milwaukee Habitat would receive the principal of a trust that will first pay lifetime income to those whom you designate in your estate plans. Please see charitable remainder trusts.</p>
<b>Undesignated Bequest</b>	<p>For an <i>undesignated bequest</i> you may add "for its general use and purposes" to the above statements.</p>
<b>Designate a Preferred Area</b>	<p>To <i>designate a preferred area</i> you may add, "to be used to local needs only, for example).</p>

Consult with your accountant and attorney to find out the best way to support Milwaukee Habitat in your planned giving.

For more information on planned giving at Milwaukee Habitat, please contact [Karen Van Hoof](#), Donor Relations Manager, at 414-562-6100 ext 5611.