



# Jewish Family and Children's Services

OF SAN FRANCISCO, THE PENINSULA, MARIN AND SONOMA COUNTIES

## Suggested Bequest Language

Bequests made through wills or living trusts are the most popular form of legacy giving. Giving by bequest costs nothing now, yet gives you the satisfaction of knowing that your legacy will live on.

There are different kinds of bequests, each requiring specific language to direct your assets in a way that successfully carries out your wishes. Each begins the same way and language you can use follows:

*I give, devise, and bequeath to Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (Tax ID #94-1156528)*

Option 1: *the sum of \$* \_\_\_\_\_

Option 2: *the following described property* \_\_\_\_\_

Option 3: \_\_\_\_\_% of my estate

Option 4: *the residue of my estate*

**For an unrestricted bequest, which allows JFCS the flexibility to meet future needs:  
for its general purposes.**

**For a restricted bequest:  
to be used for the following purpose:** \_\_\_\_\_.

*If at any time in the judgment of the Board of Directors of Jewish Family and Children's Services it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose.*

**For an endowment bequest, ensuring annual distributions of income while the principal continues to grow in perpetuity:  
to establish a Named Endowment Fund to be known as the \_\_\_\_\_ Fund  
with annual distributions of income to be used for the following purpose:** \_\_\_\_\_.

*If at any time in the judgment of the Board of Directors of Jewish Family and Children's Services it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose.*

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**Our charitable planning specialists are available to answer any questions you may have.**

**Contact us today:**

Barbara Farber, 415-449-3858, [barbaraf@jfcs.org](mailto:barbaraf@jfcs.org)

We encourage you to **let us know** if you have provided for JFCS in your will or trust so that we can recognize you as a valued member of our **Heritage Circle**. It would also be much appreciated if you would be willing to complete a Letter of Intent. Although this is completely non-binding, it does ensure that we will have a statement of your wishes on record so that future generations may benefit from your inspirational example.

*As with all important financial decisions, you may want to consult legal and financial professionals for advice.*