

McGuire Memorial Foundation Establishing a Bequest for McGuire Memorial

Naming McGuire Memorial Foundation as a beneficiary in your estate plan is a simple and lasting way to acknowledge McGuire Memorial's role in your life.

A bequest to McGuire Memorial Foundation can be included in the body of your will or in an addition to it (a codicil). To name McGuire Memorial as a beneficiary, please use this language: "McGuire Memorial Foundation in New Brighton, PA." You may designate your bequest for a purpose. Testamentary gifts to McGuire Memorial Foundation are typically deductible for estate tax purposes and may be made in the following ways:

- 1) **Residuary Bequest** – You may state that all or a portion of your estate be given to McGuire Memorial after specific amounts are distributed to other beneficiaries.
- 2) **Specific Bequest** – You may stipulate that a certain percentage of your estate, or a certain dollar amount, or particular securities or other assets be given to McGuire Memorial Foundation.
- 3) **Testamentary Charitable Trust** – You may establish a unitrust or annuity trust for specific beneficiaries through your will. The trust principal is transferred to McGuire Memorial Foundation only after the death of the last trust beneficiary.

Sample Bequest Language

The provision in your will for making a gift to McGuire Memorial Foundation will depend upon the type of gift and your own circumstances. The following are types of sample language that you and your attorney might find helpful when making a provision for McGuire Memorial Foundation.

- **The Unrestricted Gift** *I give to McGuire Memorial Foundation in New Brighton, Pennsylvania, the sum of \$_____ (or _____ percent of my estate; or the property described herein) for its general purposes*
- **Restricted Gift** *I give to McGuire Memorial Foundation in New Brighton, Pennsylvania, the sum of \$_____ (or _____ percent of my estate; or the property described herein) for the use and benefit of The School at McGuire Memorial).*
- **Residuary Gift** *All the rest, residue, and remainder of my estate, both real and personal, I give to McGuire Memorial Foundation in New Brighton, Pennsylvania, for its general purposes (or describe the specific purpose, if desired).*
- **Contingency Gift** *I devise and bequeath the residue of the property owned by me at death, real and personal, and wherever situate, to my husband (or wife) _____, if he (or she) survives me. If my husband (or wife) does not survive me, I devise and bequeath my residuary estate to McGuire Memorial Foundation in New Brighton, Pennsylvania, for its general purposes (or describe the specific purpose, if desired).*

**Contact the McGuire Memorial Foundation at 724-843-0365 with questions
or for additional information. Thank you!
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