

Sample Gift Language for your Will or Revocable Living Trust

A gift to BART Charter Public School in your will or revocable trust enables you to support our mission and make a difference in the lives of future generations. A bequest:

- is easy to arrange.
- will not alter your current lifestyle in any way.
- can be easily modified to address your changing needs.

Residual Gift Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to BART Charter Public School (Tax ID #47-0918667), located in Adams, MA, all (*or state a percentage*) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (*or for the support of a specific fund or program*).

Specific Gift Language

Naming BART Charter Public School as a beneficiary of a specific amount from your estate is easy:

BART Charter Public School (Tax ID #47-0918667), located in Adams, MA, the sum of \$ _____ (*or asset*) to be used for its general support (*or for the support of a specific fund or program*).

Contingent Gift Language

BART Charter Public School can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to BART Charter Public School (Tax ID #47-0918667), located in Adams, MA, the sum of \$ _____ (*or all or a percentage of the residue of my estate*) to be used for its general support (*or for the support of a specific fund or program*).

Retirement Plan Beneficiary Language

You may name BART Charter Public School (Tax ID #47-0918667) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify BART.