



Sample Charitable Bequest Language

The following five clauses are standard. If you wish to be more specific, your lawyer or estate planner should draft the clause to meet your specific requirements.

Specific, unrestricted:

I give, devise and bequeath to the **C&O Canal Trust** the sum of \$_____ to be used for any purpose(s) approved by the Board of Directors of the C&O Canal Trust.

Specific, restricted with escape clause:

I give, devise and bequeath to the **C&O Canal Trust** the sum of \$_____ to be used for the following purpose(s):_____.

If the **C&O Canal Trust** is unable to apply all or part of these funds for the specific purpose(s) stated herein, **C&O Canal Trust** will redirect the gift to a new purpose that is as close as possible to the original intent of the donor.

General percentage, unrestricted:

I give, devise and bequeath to the **C&O Canal Trust** _____% of the residue of my estate to be used for any purpose(s) approved by the Board of Directors of the **C&O Canal Trust**.

General percentage, restricted with escape clause:

I give, devise and bequeath to the C&O Canal Trust _____% of my estate to be used for the following purpose(s):_____.

If the **C&O Canal Trust** is unable to apply all or part of these funds for the specific purpose(s) stated herein, the **C&O Canal Trust** will redirect the gift to a new purpose that is as close as possible to the original intent of the donor.

Residual Contingent Trust

Upon the death of the survivor of my (wife, husband, etc.) _____ and my (son, daughter, etc.) _____, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to the **C&O Canal Trust**.

These are sample clauses only. Your lawyer or estate planner should always review clauses and ensure they are appropriate to your wishes, and comply with the law in your state.