



nami

National Alliance on Mental Illness

Will-Grundy

Sample Bequest Language

General Bequest – NAMI Will-Grundy receives a specified dollar amount or percentage of your residuary estate.

Example: "I give, devise, and bequeath (a) the sum of \$_____ or (b) _____% of my residuary estate to NAMI of Will-Grundy County, Illinois, an Illinois nonprofit corporation located in Joliet, IL, (Federal Tax ID #90-0343172) to be used for its general use and purposes as the Board of Directors of NAMI Will-Grundy shall determine."

Specific Bequest – NAMI Will-Grundy receives a specified asset from your personal possessions such as stocks, real estate or works of art.

Example: "I give, devise, and bequeath _____ (description of a specific asset) to NAMI of Will-Grundy County, Illinois, an Illinois nonprofit corporation located in Joliet, IL, (Federal Tax ID #90-0343172) to be used for its general use and purposes as the Board of Directors of NAMI Will-Grundy shall determine."

Residuary Bequest – NAMI Will-Grundy receives all or a percentage of the remainder of your estate after any other gifts, debts, taxes and estate expenses have been paid.

Example: "I give, devise, and bequeath (a) all or (b) _____% of the rest, residue and remainder of my estate, both real and personal and wherever situated, owned by me at death, to NAMI of Will-Grundy County, Illinois, an Illinois nonprofit corporation located in Joliet, IL, (Federal Tax ID #90-0343172) to be used for its general use and purposes as the Board of Directors of NAMI Will-Grundy shall determine."

Contingent Bequest – NAMI Will-Grundy receives a bequest only if other beneficiaries predecease you or your estate exceeds a certain value.

Example: "If _____ (names of primary beneficiaries) should predecease me, then I hereby give, devise, and bequeath (a) all or (b) _____% of the rest, residue and remainder of my estate, both real and personal and wherever situated, owned by me at death, to NAMI of Will-Grundy County, Illinois, an Illinois nonprofit corporation located in Joliet, IL, (Federal Tax ID #90-0343172) to be used for its general use and purposes as the Board of Directors of NAMI Will-Grundy shall determine."

To designate your bequest to a specific program: simply substitute "to be used to benefit NAMI Will-Grundy's (name of program)." to the language suggested above.

Restrictions

It is strongly advised that you and/or your adviser(s) discuss restrictions with the NAMI Will-Grundy Treasurer before your will or trust is finalized to assure that your wishes can be carried out.

Please consult with your attorney, financial advisor, estate planning professional, accountant or other appropriate professional before making any material decisions based on information we provide through our printed materials or other sources. All information will be kept strictly confidential.