

Suggested Forms of Bequests

Our Legal Name: **The Trustees of Reservations**
Our Address: **200 High Street, 4th Floor, Boston, MA 02110**
Our IRS Tax Identification Number: **04-2105780**



We advise you to obtain the assistance of an attorney when making or revising your will. If you have questions about this material or require additional information about making a provision in your will to benefit The Trustees of Reservations, our staff are pleased to work with you and your advisors. Suggested language for various forms of bequests include:

CASH BEQUEST

"I bequeath the sum of \$_____ to The Trustees of Reservations, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts, to be used or disposed of as The Trustees of Reservations in its sole discretion deems appropriate."

RESIDUARY BEQUEST

"I bequeath (percent) (the entire value) of the residue of my estate to The Trustees of Reservations, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts, to be used or disposed of as The Trustees of Reservations in its sole discretion deems appropriate."

BEQUEST OF REAL ESTATE

"I devise all of my right, title, and interest in and to real estate located at (give address and describe property) to The Trustees of Reservations, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts, to be used or disposed of as The Trustees of Reservations in its sole discretion deems appropriate."

RESTRICTED USE

If the gift to The Trustees of Reservations is for a purpose other than The Trustees of Reservations' unrestricted use, insert the restriction in place of the words "to be used or disposed of as The Trustees of Reservations in its sole discretion deems appropriate." For example: "I bequeath the sum of \$_____ to The Trustees of Reservations, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts for the following use: '_____.'"

In the event of a gift subject to a restriction, we would appreciate your consulting with us to determine if the restriction is appropriate for The Trustees. We also suggest including one of the following provisions:

- A. "However, I impose no legal or equitable obligation in this regard.
- B. "If in the judgment of The Trustees of Reservations it becomes, or is likely to become, impossible or impractical to accomplish the purposes of this gift, the income or principal, or both, may be used for such related purposes and in such manner as determined by The Trustees of Reservations."

For more information about leaving a bequest to The Trustees, please contact:
Julie Lazarus, Director of Planned Giving at jlazarus@thetrustees.org or **978-338-1172**.

