

BEQUESTS THROUGH A WILL, CODICIL, OR TRUST

In addition to being one of the simplest ways to distribute your estate, your will or trust can be a superb vehicle through which you may make charitable gifts to the South Carolina Bar Foundation. The Foundation can be named as a beneficiary through a will, codicil, or trust.

Residuary Bequest: A residuary bequest is used to give a portion of the estate property after all debts, taxes, expenses, and all other bequests have been paid.

Example: I give, devise and bequeath all (or a percentage) of the rest, residue, and remainder of my property of every kind and description, whether real or personal (including lapsed legacies and devises) wherever situate and whether acquired before or after the execution of this Will, to the South Carolina Bar Foundation, Inc., a nonprofit corporation qualified under Section 501(c)(3) of the Internal Revenue Code, located in Columbia, South Carolina, to be used for its exempt purposes.

Specific Bequest: A specific bequest is another way to make a charitable gift by will. With this bequest, you simply specify a dollar amount.

Example: I give, devise, and bequeath \$xxx to the South Carolina Bar Foundation, Inc., a nonprofit corporation qualified under Section 501(c) (3) of the Internal Revenue Code, located in Columbia, South Carolina, to be used for its exempt purposes.

Contingent Bequest: When writing a will, it is important to include provisions for the distribution of your property in the event that a beneficiary dies prior to your death, or a beneficiary disclaims the property. In anticipation of such an event, the Foundation could be named as the alternate or contingent beneficiary.

Example: If (name of beneficiary) predeceases me or disclaims any interest in (describe property), I give such to the South Carolina Bar Foundation, Inc., a nonprofit corporation qualified under Section 501(c)(3) of the Internal Revenue Code, located in Columbia, South Carolina, to be used for its exempt purposes.

Restricted Bequest: In the bequest provisions mentioned above, the language “to be used for its exempt purposes” is a general and unrestricted statement. If you have more specific purposes in mind, please contact us so that we can discuss your wishes to make sure they can be honored.

If you need additional information or if you wish to discuss a potential bequest, please contact the Executive Director of the South Carolina Bar Foundation:

Olivia S. Jones
olivia.jones@sbarfoundation.org
803.576.3786

**Confirmation of Planned Gift**

Name(s): _____

Address: _____

Phone Number: _____

Email Address: _____

I intend to:

- ☐ name the South Carolina Bar Foundation as a full or partial beneficiary of a life insurance policy.
- ☐ name the Foundation as a beneficiary of my retirement account.
- ☐ name the Bar Foundation in my will, codicil, or trust.
- ☐ make a gift of an appreciated security to the Foundation.

How may we recognize you?

- ☐ Yes, you may print my/our name(s) in Weinberg Society listings and other publications of the Foundation. We want to encourage others by our example.
- ☐ No, please do not print my/our name(s) in any Foundation publications. I prefer to remain anonymous.
- ☐ I am not able to confirm a planned gift at this time, but would like to make a cash gift to the Foundation. My check is enclosed.

Signature: _____

Date: _____

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit the Bar Foundation in the future and giving us guidance as to your wishes. The Foundation recognizes that gift plans may change over time. We hope you will consider notifying us of any relevant changes in your plans. We very much appreciate your expression of support for the Foundation and our mission to promote justice by funding legal access and education.

Please return this to the Foundation. You may direct any questions to:

Olivia S. Jones, Executive Director
South Carolina Bar Foundation
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olivia.jones@sbarfoundation.org
803.576.3786