



Bequest Language

Thank you for considering a bequest to the Georgia United Methodist Foundation. Please share the following suggested language with your attorney as you prepare or revise your will. If you are considering designating your bequest for a specific purpose, please contact the Foundation at 770-449-6726, 877-220-5664, or info@gumf.org.

Unrestricted Bequest and Final Tithe

"I give and bequeath the rest, residue, and remainder of my estate (or a percentage of my estate, or a dollar amount) to the Georgia United Methodist Foundation, a 501(c)(3) tax-exempt charitable not-for-profit corporation serving Georgia Methodists in Peachtree Corners, Georgia, for its general purposes."

Bequest for a Church, Agency, or Organization

"I give and bequeath the rest, residue, and remainder of my estate (or a percentage of my estate, or a dollar amount) to the Georgia United Methodist Foundation, a 501(c)(3) tax-exempt charitable not-for-profit corporation serving Georgia Methodists in Peachtree Corners, Georgia, to provide support for the ministry and mission of (name of Methodist church, agency, or organization).

Bequest for an Endowment

"I give and bequeath the rest, residue, and remainder of my estate (or a percentage of my estate, or a dollar amount) to the Georgia United Methodist Foundation, a 501(c)(3) tax-exempt charitable not-for-profit corporation serving Georgia Methodists in Peachtree Corners, Georgia, to establish an endowed fund (or the Jane and John Doe Fund, or similar wording), to be held as a permanent endowment, which shall be used for (state the purpose or beneficiary). Such fund shall be held, invested, and applied in accordance with the endowment policies of the Foundation as amended from time to time. However, if, at the time of my death, the realized amount is less than the minimum amount required to establish such an endowed fund, or in the event that such use shall, in the judgment of the President and Board of Trustees of the Georgia United Methodist Foundation, become unnecessary or impractical, then I direct that my gift shall be devoted to such purposes as the President and Board of Trustees, in their sole discretion, shall determine, keeping such use as close to my intent as possible."

Savings Clause

Suppose your bequest is restricted for a particular purpose. In that case, we ask that you incorporate a "savings clause" to accommodate changes over time in the needs of the Georgia United Methodist Foundation: "In the event that such use shall, in the judgment of the President and Board of Trustee of the Georgia United Methodist Foundation, become unnecessary or impractical, I direct that my gift shall be devoted to such purposes as the President and Board of Trustees, in their sole discretion, shall determine, keeping such use as close to my intent as possible."

Codicil to Last Will and Testament

Suppose your estate plans are up to date. In that case, you can draft a short codicil, or amendment, to the existing document, using this or similar language: "I hereby amend my Last Will and Testament, executed on the xx day of [month] in the year 20xx. I direct that all provisions of that Will remain in effect but in addition direct that the Georgia United Methodist Foundation, a 501(c)(3) tax-exempt charitable not-for-profit corporation serving Georgia Methodists in Peachtree Corners, Georgia, shall receive the sum of \$xxx dollars or percent to be used to further the mission of the Foundation as the President and Board of Trustees, in their sole discretion, may direct."