



## Sample Bequest Language for Gifts to Culture of Health–Advancing Together Through A Will or Revocable Living Trust

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Culture of Health–Advancing Together is a program of Mid-America Arts Alliance, a 501(c)(3) nonprofit organization. When you include M-AAA in your estate plans, you can support CHAT’s mission for years to come.

The language you use in a will or revocable living trust will depend on your unique circumstances and charitable objectives. We hope these sample provisions, whether used individually or in combination, will be helpful to you and your attorney.

### Proper name and charitable status

The proper name to use for a beneficiary designation in a will, trust, life insurance or annuity contract, retirement plan, and investment or bank account is “**Mid-America Arts Alliance.**” Mid-America Arts Alliance is a tax-exempt organization (**Tax ID 23-7303693**) under Section 501(c)(3) of the Internal Revenue Code and accompanying regulations.

### Restricted Bequest - CHAT

*For a restricted gift that designates how M-AAA uses your gift. To ensure your goals can be accomplished, please contact us before your estate plans are finalized.*

#### Specific dollar amount

“I give to Mid-America Arts Alliance of Kansas City, Mo., a gift of \$\_\_\_\_. This amount shall be for This amount shall be for the **Culture of Health–Advancing Together** program and is to be administered under the terms of an agreement I have on file with Mid-America Arts Alliance.”

#### Percentage amount

“I give to Mid-America Arts Alliance of Kansas City, Mo., an amount equal to \_\_\_\_\_ per cent (\_\_\_%) of my adjusted gross estate as finally determined for federal estate tax purposes. This amount shall be for the **Culture of Health–Advancing Together** program and is to be administered under the terms of an agreement I have on file with Mid-America Arts Alliance.”

#### ***We also recommend including the following provision:***

“If the Mid-America Arts Alliance Board of Directors determines that it has become unwise or unnecessary to use this gift for the purposes I have specified, then I direct that this gift be used for other purposes the Board of Directors may designate, bearing in mind my original intention.”

*This document is not meant to provide legal advice. Please consult your attorney about the laws in your state before implementing this language in your will or trust.*

## **Unrestricted Bequest**

*For an unrestricted gift that allows M-AAA to use your gift where it is most needed*

### **Specific dollar amount**

"I give to Mid-America Arts Alliance of Kansas City, Mo., a gift of \$\_\_\_\_\_, for its unrestricted charitable use and purpose."

### **Percentage amount**

"I give to Mid-America Arts Alliance of Kansas City, Mo., an amount equal to \_\_\_\_\_ per cent (\_\_\_%) of my adjusted gross estate, for its unrestricted charitable use and purpose."

### **Residuary amount**

"I give the residue of the property owned by me at the time of my death, real and personal, and wherever situate, to Mid-America Arts Alliance of Kansas City, Mo., for its unrestricted charitable use and purpose."

### **Residuary amount, dependent on size**

"I give to Mid-America Arts Alliance of Kansas City, Mo., an amount equal to \_\_\_\_\_ per cent (\_\_\_%) of my adjusted gross estate as finally determined for federal tax purposes, or \_\_\_\_\_ dollars (\$\_\_\_\_\_), whichever is larger, for its unrestricted charitable use and purpose."

### **Residuary amount, contingent**

"I give the residue of the property owned by me at my death, real and personal and wherever situate, to my [daughter] if [she] survives me. If [she] does not survive me, I give my residuary estate to Mid-America Arts Alliance of Kansas City, Mo."

## **Provision allowing for both income tax and estate tax benefits**

"I instruct that all of my charitable gifts, bequests, and devises shall be made, to the extent possible, from property that constitutes 'income in respect of a decedent' as that term is defined in the Internal Revenue Code."

## **Provision for life payments to the donor and/or a survivor, then the balance to Mid-America Arts Alliance**

Mid-America Arts Alliance staff will be pleased to discuss such a provision with you and your advisor if you wish.

## **For additional information, contact [giving@maaa.org](mailto:giving@maaa.org)**

Mid-America Arts Alliance is pleased to provide each prospective donor with a charitable gift analysis based on his or her personal circumstances and objectives. This service is provided without cost or obligation, and all inquiries are handled in confidence.

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