

BURBANK TEMPLE EMANU EL LEGACY GIFTS: SAMPLE BEQUEST LANGUAGE

Suggested Language for an Unrestricted Bequest in a Will:

I give, devise and bequeath [\$_____][_____ % of my residuary estate] to Burbank Temple Emanu El, Burbank, CA.

Suggested Language for an Unrestricted Gift in a Trust:

The trustee shall distribute [\$_____][_____ % of the principal and any accumulated income of the Trust] to Burbank Temple Emanu El, Burbank, CA.

Suggested Language to Provide income each year to Burbank Temple Emanu El in perpetuity by making a bequest to establish an endowment fund:

I bequeath \$_____ (or _____ % of my residuary estate) to Burbank Temple Emanu El to establish an endowment fund to be used for its general purposes.

Suggested Language to Create a Fund to Support a Specific Activity or Area at to Burbank Temple Emanu El:

I bequeath [\$_____][_____ % of my residuary estate] to Burbank Temple Emanu El to establish an endowment fund to support _____

If you wish to designate a gift for a specific purpose, please contact us to discuss the restriction to make sure that we will be able to honor your intentions. Since your commitment to support a specific purpose should be sufficiently flexible to account for future changes in needs, other sources of support, and changes in our community, your document should include language like this:

If at some future date, circumstances at Burbank Temple Emanu El should change so that the uses and purposes for which these funds have been designated are no longer possible or permissible or conflict with the policies of the Board of Trustees of Burbank Temple Emanu El, then the Board of Trustees of Burbank Temple Emanu El may, in its sole discretion, determine the permissible use most closely related to that identified by the [Testator -- if in a Will][Settlor-- if in a Trust] and consistent with the [Testator's][Settlor's] general interests and charitable intent in supporting Burbank Temple Emanu El.