



## Bequest Language for Estate Planning Documents

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### Outright Bequest (Unrestricted)

An outright bequest, in which you leave the SRI Foundation a specified dollar amount or specified assets, such as securities or tangible property is considered unrestricted if the gift is intended for general support of the SRI Foundation at the discretion of the **Executive Director, Secretary-Treasurer and Finance Committee of the Council**.

Consider one of the four options listed below when making your estate plans. The following language may be used when you create your will, trust, or add a codicil to your existing will:

"I give, devise, and bequeath to SRI Foundation, 555 East Wells Street, Suite 1100, Milwaukee, WI 53202; Employee Identification Number: 95-2293816"

- a. the sum of \$\_\_\_\_\_;
- b. \_\_\_\_\_% of my estate;
- c. the following securities or tangible property\_\_\_\_\_;
- d. or, \_\_\_\_\_% of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid.

### Outright Bequest (Restricted)

Donors may restrict the use of their bequests for a specific area of charitable support. This requires additional language in your estate planning documents.

"I give, devise, and bequeath to the SRI Foundation, 555 East Wells Street, Suite 1100, Milwaukee, WI 53202; Employee Identification Number: 95-2293816"

- a. the sum of \$\_\_\_\_\_;
- b. \_\_\_\_\_% of my estate;
- c. the following securities or tangible property\_\_\_\_\_;
- d. or, \_\_\_\_\_% of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid.

The property comprising this gift shall be used for (state purpose). If the need for funds for the charitable purpose described above no longer exists at some future date, the **Executive Director, Secretary-Treasurer and Finance Committee of the Council** are authorized to use these funds in the best interest of the SRI Foundation.

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### Contingent Bequest

This type of bequest provides for the SRI Foundation upon the occurrence of a certain event or series of events — if for example, your primary beneficiary does not survive you. The conditions of a contingent bequest need to be clearly stated in your will.

### Bequests to Support Endowment Funds

Both unrestricted and restricted bequests may be designated to support existing endowment funds, or establish new endowed funds:

#### *Unrestricted Endowment*

“I give, devise, and bequeath to SRI Foundation (the sum of \$ \_\_\_\_\_ ) ( \_\_\_\_\_ percent of my estate) (the following property) (the rest, residue, and remainder of my estate). The property comprising this gift may, for investment purposes, be merged with the general investment assets of the charity. The gift shall be entered into the books and recorded as “The \_\_\_\_\_ Fund” and shall always be so designated. The spendable income there from, but not the principal, shall be used to further the purposes of the SRI Foundation in such manner as the trustees may direct.”

#### *Restricted Endowment*

“I give, devise, and bequeath to SRI Foundation (the sum of \$ \_\_\_\_\_ ) ( \_\_\_\_\_ percent of my estate) (the following property) (the rest, residue, and remainder of my estate). The property comprising this gift may, for investment purposes, be merged with the general investment assets of SRI Foundation. The gift shall be entered into the Foundation’s books and records as “The \_\_\_\_\_ Fund” and shall always be so designated. The spendable income there from, but not the principal, shall be used for (state purpose). If, in the opinion of the **Executive Director, Secretary-Treasurer and Finance Committee of the Council** the need for funds for the purpose described above no longer exists at some future date, the SRI Foundation is authorized to use these funds in the best interest of organization, provided that the identity of the fund is maintained.”

Please consult with **Anne Krolkowski, Executive Director** to assure that your planned gift will be implemented according to your wishes.

Phone: (414) 918-9888 or Email: [akrolkowski@sri-online.org](mailto:akrolkowski@sri-online.org)

We also encourage you to work with your financial advisor and attorney when considering a planned gift to the SRI Foundation.