

# Partners in Housing, Inc.

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Colorado Springs, CO 80906  
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www.PartnersinHousing.org

## SAMPLE BEQUEST LANGUAGE

A gift to Partners in Housing in your will or revocable trust proclaims your confidence that we will continue to fulfill our mission and make a difference in the lives of future generations. A bequest

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

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**RESIDUAL BEQUEST:** A residual bequest comes to us after your estate expenses and specific bequests are paid:

*I give and devise to Partners in Housing, Inc., located in Colorado Springs, Colorado, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its unrestricted use (or for the Homeless Self-Sufficiency Program or the Affordable Housing Program).*

**SPECIFIC BEQUEST:** Naming Partners in Housing as a beneficiary of a specific amount from your estate is easy:

*I give and devise to Partners in Housing, Inc., located in Colorado Springs, Colorado, the sum of \$\_\_\_\_\_ to be used for its unrestricted use (or for the Homeless Self-Sufficiency Program or the Affordable Housing Program).*

**CONTINGENT BEQUEST:** Partners in Housing can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

*If (insert name) is not living at the time of my demise, I give and devise to Partners in Housing, Inc., the sum of \$\_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its unrestricted use (or for the Homeless Self-Sufficiency Program or the Affordable Housing Program).*

**RETIREMENT PLAN:** You may name Partners in Housing as a beneficiary of your IRA or other qualified retirement benefits. To make a charitable gift from your retirement plan, simply enter "Partners in Housing, Inc." and Federal Tax ID #84-1188208 on the Change of Beneficiary Form available from your plan administrator. Consult with your advisor to determine the benefits you would derive from such a gift.

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*Neither Partners in Housing nor the Diocese of Colorado Springs are engaged in rendering legal or tax advisory services. The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.*