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SAMPLE BEQUEST LANGUAGE FOR YOU AND YOUR ATTORNEY

1. Specific Bequest – generally the most frequently used bequest, the specific bequest directs a specific amount of money or a specific asset to an individual or organization.

Sample Language for Specific Bequest:

I give, devise, and bequeath \$_____ to Junior Achievement of Southwest Florida, Inc., (FEDERAL TAX ID# 65-0503084), a 501 (c)(3) nonprofit organization located at 9530 Marketplace Road, Suite 302, Fort Myers, Florida, 33912-0393, for its general use and purposes.

2. Percentage Bequest – A percentage bequest directs the bequest designation as a percentage of an estate rather than a specific dollar amount or specific item.

Sample Language for Percentage Bequest:

I give, devise, and bequeath ____% to Junior Achievement of Southwest Florida, Inc., (FEDERAL TAX ID# 65-0503084), a 501 (c)(3) nonprofit organization located at 9530 Marketplace Road, Suite 302, Fort Myers, Florida, 33912-0393, for its general use and purposes.

3. Residuary Bequest – The residuum of an estate is the part left after all expenses have been paid and other specific and percentage bequests have been distributed. A residuary bequest gives the residuum of an estate to a designated beneficiary. Because residuary bequests are distributed last, donors sometimes feel a level of comfort knowing their wishes for family and loved ones will be provided for first.

Sample Language for Residuary Bequest:

I give, devise, and bequeath the rest, residue, and remainder of my estate consisting of property, both real and personal, wherever situated, which I may own or be entitled to at my death, to Junior Achievement of Southwest Florida, Inc, (FEDERAL TAX ID# 65-0503084), a 501 (c)(3) nonprofit organization located at 9530 Marketplace Road, Suite 302, Fort Myers, Florida, 33912-0393, for its general use and purposes.

Any questions, call Victoria Stephan, President, Junior Achievement of Southwest Florida, Inc. at 239-225-2590 or vstephan@jaswfl.org.