

We provide suggested bequest language for you to share with your attorney to assist in drafting estate planning documents that will achieve your charitable estate planning goals.

General Bequest

“I give and bequeath the rest, residue, and remainder of my estate, both real and personal, to the ENDOWMENT FUND of SENIOR SERVICES OF ALEXANDRIA, EIN: 54-0842806, or its successor organization, to be used as its leadership shall determine appropriate.”

Contingent Bequest

“If [*insert name*] does not survive me, I give and bequeath the rest, residue, and remainder of my estate, both real and personal, to the ENDOWMENT FUND of SENIOR SERVICES OF ALEXANDRIA, EIN: 54-0842806, or its successor organization, to be used as its leadership shall determine appropriate.”

Specific Bequest

“I give and bequeath _____ [*dollar amount, description of property, or percent of estate*] to the ENDOWMENT FUND of SENIOR SERVICES OF ALEXANDRIA, EIN: 54-0842806, or its successor organization, to be used as its leadership shall determine appropriate.”

Residuary Bequest

“I give and bequeath all the rest, residue, and remainder of my estate, both real and personal, to the ENDOWMENT FUND of SENIOR SERVICES OF ALEXANDRIA, EIN: 54-0842806, or its successor organization, to be used as its leadership shall determine appropriate.”

Restricted Bequest for Specific Purpose

“I give and bequeath _____ [*dollar amount, description of property, or percent of estate*] of the rest, residue, and remainder of my estate to SENIOR SERVICES OF ALEXANDRIA, EIN: 54-0842806, or its successor organization, to be used for _____ [*describe or name the program*]. If at any time in the judgment of the Senior Services of Alexandria Board of Directors it is deemed impossible or impracticable to carry out the above purpose, the Board of Directors shall determine a purpose as near as possible to that described above.”

Life Insurance or Retirement Plans

SSA can be designated as the primary beneficiary or a contingent beneficiary of a life insurance policy or retirement plans such as IRA, ROTH IRA, 401(k), 403(b), KEOGH plan, etc.

“SENIOR SERVICES OF ALEXANDRIA, ENDOWMENT FUND, EIN: 54-0842806”