

SAMPLE BEQUESTS

GENERAL BEQUEST – DOLLAR AMOUNT

“I give, devise and bequeath the sum of Dollars (\$) to the Oregon Historical Society, an Oregon nonprofit located in Portland, OR, to be used for its general purposes.”

GENERAL BEQUEST – PERCENTAGE OF GROSS ESTATE

“I give, devise and bequeath percent (%) of my gross estate to the Oregon Historical Society, an Oregon nonprofit located in Portland, OR, to be used for its general purposes.”

GENERAL BEQUEST – RESIDUAL ESTATE

“I give, devise and bequeath all of the rest, residue and remainder of my estate to the Oregon Historical Society, an Oregon nonprofit located in Portland, OR, to be used for its general purposes.”

SPECIFIC PURPOSE BEQUESTS

“ (a specific asset) or (the sum of \$) or (%) of the rest, residue, and remainder of my estate) to the Oregon Historical Society, an Oregon nonprofit located in Portland, OR to be used for the following purposes...”

The Oregon Historical Society requests that donors or their attorneys contact the Development Office to discuss options for giving for one or more specific purposes. The Oregon Historical Society’s programs and activities may change overtime, in response to budgetary restrictions or to accommodate new opportunities. Therefore, whenever you indicate a particular purpose for your bequest, it is advisable to grant the Oregon Historical Society the authority to respond to changing needs. You may do this by including the following language with your bequest: “If at any time in the judgment of the Oregon Historical Society Board of Trustees, it is impossible or impracticable to carry out exactly the designated purpose, the Oregon Historical Society Board of Trustees shall determine an alternative purpose as near as possible to the designated purpose.”

CONTINGENT BENEFICIARY PROVISION

“In the event that my spouse and children pass away prior to the distribution of my estate without leaving surviving issue, then, in that event, the undistributed corpus of my estate should be distributed to the Oregon Historical Society, an Oregon nonprofit located in Portland, OR, to be used for its general purposes.”

The sample language provided above does not constitute legal advice and should not be relied upon as such. Rather, it is intended to provide you a variety of options as you consider making a bequest to the Oregon Historical Society. The Oregon Historical Society would be happy to consult with you and your estate planning attorney should you have any questions about options in making bequests to the Oregon Historical Society. Thank you.