



Stronger today. Brighter tomorrow.

Family Service Association of Bucks County
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Examples of Specific Bequest Language for Family Service Association of Bucks County

Specific Bequest Language

Naming Family Service as a beneficiary of a specific amount from your estate is easy:

I give and devise to Family Service Association of Bucks County, located in Langhorne, PA, the sum of \$_____ to be used for its general support (or for the support of a specific affiliate, fund or program).

Residual Bequest Language

A residual bequest comes to Family Service after your estate expenses and specific bequests are paid:

I give and devise to Family Service Association of Bucks County, located in Langhorne, PA, all (or a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language

Family Service 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 Family Service Association of Bucks County, located in Langhorne, PA, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Retirement Plan Beneficiary Language

You may name Family Service as a beneficiary of your IRA or other qualified retirement benefits. **Donors should consult with their tax advisor regarding the tax benefits of your gift.**

Naming Family Service as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming the Family Service as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support Family Service free of both estate and income taxes.

- Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change of beneficiary form from your plan administrator. When you are done, please return the form to your plan administrator and notify Family Service you are supporting. We can usually assist you with the proper language for your beneficiary designation.