



Bequest Information

One way for you to support the Surry County Schools Educational Foundation is to leave a gift to the Foundation by bequest in your Will or Trust. Making a gift by bequest allows you to continue to use the property you will leave to charity during your life and enables you to leave a lasting legacy.

Types of Bequests

There are a number of ways you can make a bequest to the Foundation, such as a “specific bequest” in which you make a gift of a specific asset such as real estate, a car, other property or a gift for a specific dollar amount. For example, you may wish to leave your home or \$10,000 to the Foundation. Another form of a specific bequest is leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 10% of your estate to the Foundation.

An additional form of bequest is a “residual bequest” in which you give the balance or remainder of your estate to the Foundation after you have made specific bequests or gifts to named individuals or other charities. For example, you may wish to leave 25% of the residue of your estate to the Foundation.

Bequest Language

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to the Foundation in your estate plan. We have provided some basic bequest language to assist you and your attorney.

I. For Unrestricted Gifts to the Foundation:

*I give, devise, and bequeath to the Surry County Schools Educational Foundation, a charitable educational foundation, the sum of \$____, **or** ____ percent of my estate, **or** the following property: ____, **or** all of the remainder of my estate, to be used to enhance the programs of the Foundation as determined by its Board of Directors.*

II. For Restricted Gifts to the Foundation:

*I give, devise, and bequeath to the Surry County Schools Educational Foundation, a charitable educational foundation, the sum of \$____, **or** ____ percent of my estate, **or** the following property: ____, **or** all of the remainder of my estate, for the following purpose(s):*

If, in the opinion of the Foundation’s Board of Directors, all or part of my gift cannot appropriately be used in the manner herein described, the Board of Directors may use the gift for other purposes as nearly aligned to my original intent as the Board of Directors deems appropriate under the circumstances.