

To Complete a Bequest to the Diocese of Ohio

It is always advisable to consult with your attorney on the best way to handle your bequest intention. Usually you can add an addendum to your will, without having to rewrite the entire document.

First, determine the appropriate bequest for your purposes – whether it is an outright bequest, a contingent or remainder bequest, or a restricted bequest.

- An **outright bequest** may be funded through your estate plan in a variety of ways. Frequently donors specify in their will a percent of their estate, such as 10% - a tithe – to be given. Or you may specify a dollar amount be given. Property, such as a house, land, valuable art or a collectable, may also be given outright to the Diocese.
- A **contingent bequest** provides for the distribution of your assets to the Diocese if none of the people named in your will survive you.
- A **restricted bequest** directs that your gift be used for a specific purpose or program of the Diocese. Whether to restrict your bequest can be an important consideration. The purpose of planned giving is to support the mission of the church as wisely and simply as possible, especially considering the long term and future needs of the Diocese. Please review your designation in advance with the Diocese, so you are confident the gift can be used as you intend.

Wording for an Outright Bequest with a specific amount or percentage:

“I give and bequeath to the Episcopal Diocese of Ohio, 2230 Euclid Avenue, Cleveland, Ohio 44115 (\$ _____) or (_____ percent of the residue of my estate) to be used to assist in ministry to the churches and people of the Diocese at the discretion of the Diocese.”

Wording for a Contingent Bequest:

“In the event that beneficiaries of my estate predecease me, or, in the case of institutions, cease to be organizations described in section 501(c)(3) of the Internal Revenue code, I hereby bequeath to the Episcopal Diocese of Ohio, the rest, residue, and remainder of my estate, to be used to assist in ministry to the churches and people of the Diocese.”

Wording for a Restricted Bequest:

“I give and bequeath to the Episcopal Diocese of Ohio, 2230 Euclid Avenue, Cleveland, Ohio 44115, (\$ _____) or (_____ percent of the residue of my estate); its use to be restricted for the following purpose (s): _____.”

For more information please contact Laura Hnat, Chief Development Officer at 216-774-0463 or Lhnat@Dohio.org.