



United Way
Thompson Nicola Cariboo

Sample Will Clauses

When making or revising a will it is recommended you obtain the assistance of your legal advisor. As the following examples show, bequests to United Way Thompson Nicola Cariboo do not need to be complex and can take various forms to meet your wishes.

Legal name: Thompson Nicola Cariboo United Way
Charitable Registration Number: 119278257 RR 0001
Address: 177 Victoria St. Kamloops, BC V2C 1Z4

Bequest for Unrestricted Purposes

This is the most flexible type of bequest and is extremely important as United Way is granted full discretion in using the gift.

Examples:

- A **specific** bequest – gives a specific cash amount or item of property.

“I give to Thompson Nicola Cariboo United Way the sum of \$ _____ (or named property) to be used for the general purposes of United Way, as the Board of Directors shall determine.”

- A **residual** bequest – gives all or a portion of whatever remains after payment of debts, taxes, and other bequests.

“I give to Thompson Nicola Cariboo United Way _____ percent of the residue of my estate to be used for the general purposes of United Way, as the Board of Directors shall determine.”

- A **contingent** bequest – take effect only if the primary purposes cannot be achieved, for example, if the primary beneficiary does not survive you.

“If (name of primary beneficiary) does not survive me for 30 days, then I give to Thompson Nicola Cariboo United Way (a cash amount, named property, percentage of the residue) to be used for the general purposes of United Way, as the Board of Directors shall determine.

Bequest for Restricted Purposes

Any of the above forms of bequest can also be used in making a restricted use bequest, simply describe the particular purpose. For example:

“I give to Thompson Nicola Cariboo United Way the sum of \$ _____ (or named property) to be used for (e.g. a United Way program supporting youth).”

Or

“I give to Thompson Nicola Cariboo United Way ___ percent of the residue of my estate to be used for (e.g. a United Way program supporting youth).”

It is a good idea to include language that allows United Way to use the gift for a different purpose if circumstances change. For example:

“In the event that, in the opinion of the Board of Directors of Thompson Nicola Cariboo United Way, it should become impossible, inadvisable or impractical to apply this bequest for its stated purposes, the bequest may be used for other purposes which conform as much as possible with the spirit and intent of the bequest.”

Please obtain advice from your legal advisor in preparing your Will and making a gift through your Will. The above information can be used for discussion purposes by you and your legal advisor, however it is not intended to be legal advice.

If you have any questions, please contact:

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