

LETTER 1: General Response to Bequest Inquiry

[DATE]

[ADDRESS]

Dear [DONOR NAME]:

Thank you for requesting information about making a bequest to benefit [STATION]. Gifts made by bequest play a vital part in [STATION]'s future. Your bequest may reduce or eliminate your federal estate taxes while benefiting a particular program or fund or honoring a physician at the hospital. In addition, you are able to make a significant contribution without depleting your current assets.

Your bequest can take various forms:

- **Specific Bequest:** [STATION] receives a specific dollar amount, a percentage of your estate, or specific property. This is the most popular form of bequest.
- **Residuary Bequest:** [STATION] receives all or a stated percentage of your estate after distribution of specific bequests and payment of debts, taxes, and expenses.
- **Contingent Bequest:** [STATION] receives part or all of your estate under certain specified circumstances.
- **Trust Under Will:** [STATION] receives a portion of your estate as stated in the terms of your trust.

Property including cash, securities, jewelry, artwork, and real estate can be given through your will. I have enclosed information about sample bequest language that will help you and your attorney in drawing up a bequest to benefit [STATION]. You may be able to make a bequest to benefit [STATION] through use of a codicil, an amendment to your will. Making a new will may not be necessary.

Your bequest qualifies you for membership in the [SOCIETY NAME], established to recognize donors who have made life income gifts or gifts through their estates. Members will be recognized at an annual special event.

Sincerely,
[STATION CONTACT]
[TITLE]

ENCLOSURE: Sample Bequest Language

Next sample >>

LETTER 2: General Response to Bequest Inquiry

[DATE]

[ADDRESS]

Dear [DONOR NAME]:

Thank you for your inquiry about how to make a gift through bequest by will or living trust. Enclosed please find the information you requested.

Creating a Lasting Legacy

While annual memberships, grants, and underwriting are critical to the success of public broadcasting and provide an annual base of support for our programming, our future success is predicated on our ability to build a sustainable source of funding that provides for today, tomorrow, and the future as well. By creating a bequest in your will or trust, you help ensure that the future of WDEI public broadcasting continues for generations to come.

A Gift That Gives Back

In general, bequests are often the simplest and most common type of legacy gift that our members establish. You can structure a bequest as unrestricted or specify that your bequest benefit a particular purpose, such as to support a special programming fund or technology fund for public broadcasting. You may enumerate a specific dollar amount or allocate the residue remaining in your estate after all other gifts to family and others are met. Bequests may also be made contingent upon another event occurring -- such as a spouse or another beneficiary predeceasing you.

There are financial benefits associated with creating this type of legacy gift that are in addition to the intangible rewards you receive from giving. The value of a gift by bequest is deductible from the value of the estate that is subject to estate tax. This may reduce the rate at which the remainder of your estate is taxed, thereby preserving the value of the estate passed to heirs.

The assets you select to give-- cash, securities, insurance, real estate, or other personal property-- may also affect the value of the estate passed to heirs. In all charitable estate planning matters, [STATION] encourages you to seek professional advice from your trusted advisors. The information contained herein is for the purpose of example only and is not meant to serve as advice in lieu of advice that you may receive from your own financial and tax planning counsel. When meeting with your advisors, you may want to discuss:

Drafting a New Will

A bequest to benefit [STATION] is simple to set up. The language of a charitable bequest is similar to that listed below, and descriptions of the different types of bequests you may include in your will follows:

“To [STATION], I give, devise, and bequest (insert a sum of money, percentage of estate, remainder of estate, or a description of bequest property).”

Types of Bequests

- **Specific Bequest:** [STATION] receives a specific dollar amount, a specific piece of property, or a stated percentage of the estate. This is one of the most popular forms of bequests.
- **Residuary Bequest:** [STATION] will receive all or a stated percentage of an estate after distribution of specific bequests and payment of debts, taxes, and expenses.
- **Contingent Bequest:** [STATION] will receive part or all of the estate under certain specified circumstances.
- **Trust Established Under a Will:** A trust may be established that provides for both [STATION] and other beneficiaries.

If You Already Have a Will

If you already have your estate plans in place, but wish to amend your plans, the easiest way to make a charitable gift through a bequest is by adding a codicil-- a simple statement spelling out the beneficiary organization and the gift. You do not need to change the body of your will. The codicil is executed with the same formalities as a will. And, always, please check with your trusted advisors on planning that is best suited for you and your family.

Whether you are drafting a will for the first time or amending your will through a codicil, you will need to provide your advisors with our official name, our legal address, phone number, and tax ID number. Information is provided below.

[OFFICIAL STATION NAME]

Tax I.D. # [NUMBER]

[ADDRESS]

[PHONE]

[EMAIL]

To determine the tax benefits for your situation, check with your tax advisor, certified public accountant or attorney. To contact [STATION] for additional information on our legacy gift and endowment program, please call [STATION CONTACT] at [PHONE]. Thank you for your continued support of the mission of public broadcasting in our community.

Sincerely,

[STATION CONTACT]

[TITLE]