

# BEQUEST LANGUAGE: HOW TO WRITE A GOOD WILL

Where there is a will...there is a way...to support your church for years to come. But a well-written bequest has two elements: focus and flexibility. Avoid writing a restrictive will that is difficult to enforce. See samples below.

*“I give, bequeath and devise [dollar amount or description of property] **OR** [all, or \_\_\_percent of] of the rest, residue and remainder of my estate, both real and personal, wherever situated, which I may own or be entitled to at my death, to my church [name \_\_\_\_\_ include full physical address]*

- ❖ *to be used at the discretion of its Board of Trustees; (not designated; best!)*
- ❖ *or for a designated church or ministry; (a stated percentage is always better)*
- ❖ *or to establish an endowment or support the endowment fund;*
- ❖ *or for a designated purpose.” (important: see suggestions below)*

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Goal: Help erase indebtedness. Not good: “...debt retirement”. By the time your will is executed there may be no debt to retire, then your will becomes unusable. It can set up a legal fight with members of your family.

Better: “first for debt retirement, then for any such needs as the building may require (or some other purpose....or for the general fund...). This wording offers flexibility.

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Goal: Young people and education. Not good: “scholarships for high school graduates who are members of this church going to a UM related university....”

Better: “first, scholarships for high school graduates from this church going to a UM related university or seminary, and then high school graduates from the church and community to any university, or seminary/career training/educational facility.” A great gift for many.

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Goal: Help the poor. Not good: “the church’s food pantry ministry....” There may come a time when the church no longer has a food pantry ministry.

Better: “first, the food pantry, secondly, any ministries the church uses to support the needy in our community...” Very generous and helpful.

*This advisory prepared by Rev. David A. Rash, Stewardship Matters of Virginia LLC. Rev. Rash is a pastor with a heart for the church, not an attorney, nor a tax advisor, nor a certified financial planner. Consult a professional for expert advice.*

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