



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 of the Lower Mainland need not be complex and can take various forms to meet your wishes.

Legal name: United Way of the Lower Mainland
Charitable Registration Number: BN108160185 RR0001
Address: 4543 Canada Way, Burnaby, BC V5G 4T4

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 United Way of the Lower Mainland 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 United Way of the Lower Mainland _____ 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 United Way of the Lower Mainland (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 United Way of the Lower Mainland the sum of \$_____ (or named property) to be used for (e.g. a United Way programs Supporting Youth).”

Or

“I give to United Way of the Lower Mainland _____ percent of the residue of my estate to be used for (e.g. a United Way programs 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 United Way of the Lower Mainland, 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:

Michelle Bernard

Manager of Philanthropy

604.294.8929 ext. 2442

michelleb@uwlm.ca