

Bequest Intention Form

CONFIDENTIAL



Please use this form to share the details of your bequest intentions with the Becket Athenaeum. In recognition of your disclosure, we will be honored to invite you to join our 1888 Legacy Society, a select group of donors who have created a future gift intention to support our beloved library.

1. ____ **There is a bequest in my/our will or trust to benefit the Becket Athenaeum Endowment Fund**
(to support the operational budget of the library.)

- A specific dollar amount: \$ _____
- A percentage of my/our estate: _____%
- The residual of my/our estate

Enclosed is a copy of the relevant provision in my/our will

2. ____ **There is a bequest in my/our will or trust to benefit the Becket Athenaeum Children's Endowment Fund** *(to support the children of Becket and Washington through materials, programs, and services.)*

- A specific dollar amount: \$ _____
- A percentage of my/our estate: _____%
- The residual of my/our estate

Enclosed is a copy of the relevant provision in my/our will

3. ____ **Becket Athenaeum Endowment Fund is a/the beneficiary of my IRA or other retirement plan**
and/or

____ **is a/the beneficiary of:**

- A Charitable Remainder Trust
- A Life Insurance Policy
- A Financial or Investment Account

4. ____ **Becket Athenaeum Children's Endowment Fund is a/the beneficiary of my IRA or other retirement plan**

and/or

____ **is a/the beneficiary of:**

- A Charitable Remainder Trust
- A Life Insurance Policy
- A Financial or Investment Account

Currently, I estimate that this may result in a gift of: \$ _____

Contact Information

Donor(s)

Name (s): _____

Address: _____

City: _____ State: _____ Zip: _____

Home Ph: _____ Cell: _____ Email: _____

Attorney

Name/Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Work: _____ Cell: _____ Email: _____

Financial Advisor

Name/Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Work: _____ Cell: _____ Email: _____

_____ I/We hereby give permission to the Foundation to use my/our name/Fund in its publications.

_____ I/We hereby choose to have my/our name(s) remain anonymous.

_____ I/We hereby give permission to the Foundation to use my/our name/Fund in its publications after my/our lifetime.

Signed: _____ Date of Birth: _____ Dated: _____

Signed: _____ Date of Birth: _____ Dated: _____

The Becket Athenaeum Endowment and Children’s Endowment Funds are component funds of Berkshire Taconic Community Foundation. The following provides typical language to include a charitable bequest in your will. Please consult with your attorney.

Please mail completed form to:
Becket Athenaeum
PO Box 9
Becket, MA 01223

or scan and email to:
PlannedGiving@BWLlibrary.org

Sample Bequest Language

1. Percentage: “I give to Becket Athenaeum Endowment or Children’s Endowment Fund, (a) fund(s) of Berkshire Taconic Community Foundation, a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, _____% of my estate.”

2. Specific: “I give to Becket Athenaeum Endowment or Children’s Endowment Fund, (a) fund(s) of Berkshire Taconic Community Foundation, a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257” (Choose one or more that apply):

a. The sum of \$ _____

b. _____ shares of stock in _____ Company

c. My real property commonly known as _____.

3. Residual: “I give to Becket Athenaeum Endowment or Children’s Endowment Fund, (a) fund(s) of Berkshire Taconic Community Foundation, a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, all the residue of my estate, including real personal property.”

4. Contingent: “In the event of the death of any of the beneficiaries, I give to Becket Athenaeum Endowment or Children’s Endowment Fund, (a) fund(s) of Berkshire Taconic Community Foundation, a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, _____ (a percentage, specific, or residual language as above)