

Barre Center for Buddhist Studies

149 Lockwood Road
Barre, MA 01005



(978) 355-2347
www.dharma.org

SAMPLE LANGUAGE FOR BEQUESTS TO BCBS

Specific Restricted and Unrestricted Bequests

“I give and bequeath to the Barre Center for Buddhist Studies (BCBS) located at 149 Lockwood Rd, Barre, MA 01005 (tax-exempt ID#223-058-493), the sum of \$_____ (or an accurate description of securities, real estate or other property given) for its general charitable purposes (or specify a program*).”

Percentage Bequest

“I give and bequeath to the Barre Center for Buddhist Studies (BCBS) located at 149 Lockwood Rd, Barre, MA 01005 (tax-exempt ID#223-058-493) for its general charitable purposes an amount equal to _____% of my gross estate, as finally determined for federal estate tax purposes.”

Residual Bequest

“All (or _____% of) the residue of my estate, including real and personal property, I give, devise, and bequeath to the Barre Center for Buddhist Studies (BCBS) located at 149 Lockwood Rd, Barre, MA 01005 (tax-exempt ID#223-058-493) for its general charitable purposes.”

Contingent Bequest

“In the event that any of the above-named beneficiaries should predecease me, or that any of the above bequests shall otherwise not be effective, I give, devise, and bequeath to the Barre Center for Buddhist Studies (BCBS) located at 149 Lockwood Rd, Barre, MA 01005 (tax-exempt ID#223-058-493) for its general charitable purposes all property which said beneficiary or beneficiaries would have received if said beneficiary or beneficiaries would have survived me.”

*In the case of a restricted gift it is wise to include a saving or escape clause so that your gift can continue to be useful to BCBS if conditions change in a way that would nullify or make impractical the original purpose. Consider adding the following language: “If at some future time, in the judgment of the Board of Directors of BCBS, it is no longer practicable to use the principal of this bequest for the purposes intended, the Board of Directors have the right to use the income or principal for whatever purpose they deem necessary and most closely in accord with the intent described herein.”

Although it's not necessary to let us know about your bequest, it helps BCBS's long-term planning to be aware of your gift. To receive a Planned Giving Response Form, please contact Sumi Loundon at (978) 355-2347 or SumiL@dharma.org or download a form from our website at www.dharma.org/bcbs.