



## **Suggested Forms of Bequests**

When making or revising a will or other testamentary document, such as a trust agreement, you should obtain the assistance of an attorney. The following models may be included in a will or other testamentary document to make various types of bequests.

### **LEGAL DESIGNATION:**

If you wish to name Hudson Headwaters in your will or estate plan, we should be named as follows:

**HUDSON HEADWATERS HEALTH FOUNDATION**

9 Carey Road, Queensbury, NY 12804

Our tax identification number is: **[65-1261242]**.

### **1. Unrestricted bequest:**

(a) Specific dollar amount:

"I bequeath the sum of \_\_\_\_\_ Dollars (\$\_\_\_\_) to HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

(b) Specific personal tangible property (such as artwork, jewelry, etc.):

"I bequeath to HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804,, [all of my] [such of my] \_\_\_\_\_ to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

(c) Specific real property:

"I devise all of my right, title and interest in the real property located at \_\_\_\_\_ to HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

(d) Share of, or entire residue, of estate:

"I devise and bequeath [all] [or] [\_\_\_\_%] of the remainder of my estate to HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

### **2. Restricted bequest:**

If your donation is for a purpose other than Hudson Headwaters' unrestricted use, insert the restriction in place of the words "to be used or disposed of as its Board of Directors in its sole discretion deems appropriate." For example:

"I bequeath the sum of \_\_\_\_\_ Dollars (\$\_\_\_\_) to HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, for the following charitable use and purpose:

\_\_\_\_\_.

In the event of a gift a subject to a restriction, we suggest also including one of the following provisions:

"However, I impose no legal or equitable obligation in this regard."

or

"If in the judgment of the Board of Directors of Hudson Headwaters it becomes impossible to accomplish the purposes of this bequest or it is no longer practicable or appropriate, the income or principal may be used for such related purposes and in such manner as determined by its Board of Directors, giving consideration, where possible, to my special interest as described above."