

Bequest Language for Advisors

Helping your client have a lasting impact

Thank you for assisting your client with charitable gift planning. We find that the most popular way of making a planned gift to support our health care mission is through a bequest in a will or living trust. Bequests may be of cash, securities, real estate, or other property, and all sizes are welcome. If your client desires to specify a particular use, we are glad to assist with memorializing this intent. Please contact us at your convenience with any questions.

Suggested language

Bequests should be directed to Advocate Charitable Foundation, which accepts gifts on behalf of all Advocate hospitals and programs. The following language may be useful to you:

Specific Bequest: I give Advocate Charitable Foundation in Downers Grove, Illinois, the sum of \$ _____ to be used by Advocate _____ (*specify name of hospital or program*) in _____, Illinois, [for its special needs *or* for its _____ (*specify fund or program*)].

Residual Bequest: I give Advocate Charitable Foundation in Downers Grove, Illinois, _____% of the residue of my estate to be used by Advocate _____ (*specify name of hospital or program*) in _____, Illinois, [for its special needs *or* for its _____ (*specify fund or program*)].

Contingent Bequest: In the event that _____ does not survive me, I give Advocate Charitable Foundation in Downers Grove, Illinois, the sum of \$ _____ (or, alternatively, _____% of the residue of my estate) to be used by Advocate _____ (*specify name of hospital or program*) in _____, Illinois, [for its special needs *or* for its _____ (*specify fund or program*)].

Additional suggested language

To ensure that we will be able to make use of all bequests intended to support our mission and to address possible situations of future obsolescence, we encourage inclusion of the following:

If, in the opinion of the Board of Directors of Advocate Charitable Foundation, the need for funds for the purpose described above no longer exists at some future date, the Board of Directors is authorized to use these funds for a purpose as similar as practical to my stated interest.

For more information:

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