

# Making a Gift by Will or Living Trust

## Have a lasting impact

Thank you for considering making a gift through your will or living trust to support our healing and health care mission. We would be honored to be a part of your legacy. Bequests may be of cash, securities, real estate, or other property, and all sizes are welcome. If you desire to specify a particular use, we are glad to assist with memorializing your intent.

Please direct your bequest to Advocate Charitable Foundation, which accepts gifts on behalf of all Advocate hospitals and programs. The following language may be useful to your attorney:

**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, or any successor thereto, the need for funds for the purpose described above no longer exists at some future date, it is authorized to use these funds for a purpose as similar as practical to my stated interest.*

## For more information:

**John Holmberg, CFP®**  
Vice President, Gift Planning  
630-929-6945  
[john.holmberg@advocatehealth.com](mailto:john.holmberg@advocatehealth.com)

**Office of Gift Planning**  
Advocate Charitable Foundation  
3075 Highland Parkway, Suite 600  
Downers Grove, IL 60515

Fax: 630-929-9900

[www.advocategiving.org](http://www.advocategiving.org)

Tax ID: 36-3297360