Porto Charities Inc. – Sample Bequest Language

Bequests are gifts that are made as part of your will or estate plan. Charitable bequests are flexible, easy to update and may offer significant tax savings. A bequest can help you define your legacy while also supporting the causes that are important to you.

A bequest may be for a specific dollar amount, a percent of your estate or a combination of both.

Sample language for an unrestricted amount

I hereby give and bequest to Porto Charities Inc. the greater of \_\_\_\_\_ % or $ \_\_\_\_\_\_\_\_\_\_\_of my estate to be used by Porto Charities Inc. as they direct.

Sample language for a restricted amount

I hereby give and bequest to Porto Charities Inc. the greater of \_\_\_\_\_ % or $ \_\_\_\_\_\_\_\_\_\_\_of my estate to be used according to my most recent gift agreement or written instructions on file with Porto Charities Inc.

Please contact Bill Mundy, Secretary, at bill.mundy@portocharities.org if you leave a bequest to Porto Charities Inc. Upon notification, we will enroll you in our Legacy Society and ensure that your gift is used according to your instructions.