



Sample Bequest Language

Old World Wisconsin Foundation also known as Old World Foundation is a 501(c)(3) non-profit organization founded in 1984.

Our Mission: Enriching lives through the preservation and celebration of history, Old World Foundation is dedicated to responsibly funding the advancement of Old World Wisconsin.

Our Vision: A future where lessons of the past ignite curiosity, inspire learning, and foster a deeper understanding of our diverse cultural heritage through impactful giving.

Old World Wisconsin Foundation, Inc.

Mailing Address:

P.O. Box 347

Elkhorn, WI 53121

Federal Identification Number: 39-1484170

The following includes several examples of suggested wording for bequests to benefit Old World Wisconsin through Old World Foundation. Each situation is unique, and we encourage you to consult with your tax advisor, financial advisor, or estate planning attorney regarding your intentions. Old World Foundation does not provide legal or tax advice.

SPECIFIC GENERAL BEQUEST

"I give to Old World Wisconsin Foundation, a Wisconsin nonprofit organization, or its successor organization, the sum of \$ _____ (or % of my estate), (or other personal property herein described) to be used for its general support and charitable purposes without restriction."

RESIDUARY GENERAL BEQUEST

"I give to Old World Wisconsin Foundation, a Wisconsin nonprofit organization, or its successor organization, (all or a % of) the residue of the property owned by me at death, real and personal and wherever situated to be used for its general support and charitable purposes without restriction."

"GREATER OF" RESIDUARY GENERAL BEQUEST

"I give to Old World Wisconsin Foundation, a Wisconsin nonprofit organization, or its successor organization, the greater of _____ % of my estate or \$ _____ to be used for its general support and charitable purposes without restriction."

Contingent Gifts in a Will

It is possible that the primary beneficiary or beneficiaries of one's estate may not be there in the future. In such case, a contingent bequest naming Old World Wisconsin Foundation as a contingent beneficiary can provide a meaningful alternative.

"I give the residue of the property owned by me at my death, real and personal and wherever situate, to _____, if he/she survives me. If he/she does not survive me, I give to Old World Wisconsin Foundation, a Wisconsin nonprofit organization, or its successor organization, the residue of the property owned by me at death, real and personal and wherever situated to be used for its general support and charitable purposes without restriction."

Bequest Restricted for a Specific Use

Some donors desire their gift to support a specific project, program, or area of research. Restricted bequests are fine, although it is important they provide for some flexibility to adapt to changing needs and programs.

"I give to Old World Wisconsin Foundation, a Wisconsin nonprofit organization, its successor organization, the sum of \$_____ (or % of my estate), (or other personal property herein described) to be used for (designated purpose*). If at any time it becomes impossible or impractical for my gift to be used for the above designated purpose, Old World Wisconsin Foundation shall use my gift for a purpose and in a manner that it determines most closely meets the above designated purpose."

For more information, please contact:

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