

## De Marillac Academy

175 Golden Gate Avenue ● San Francisco, CA 94102 ● 415-552-5220 ● Fax 415-621-5632

### Sample Language to Include De Marillac in Your Will

Whether supported through a simple cash contribution or a planned gift under a Will, De Marillac succeeds because of the generosity and commitment of the Daughters of Charity, the De La Salle Christian Brothers, foundations, corporations, and individual donors. Your support helps ensure De Marillac's success in providing innovative, comprehensive and accessible Catholic education in the Vincentian and Lasallian traditions for children from underserved families in the Tenderloin and other at-risk communities in San Francisco.

*In your Will, you may leave De Marillac Academy a specific amount of money or specific property:*

**“I give, devise and bequeath to De Marillac Academy, a California Religious Corporation, the [sum of \$ \_\_\_\_\_][description of property], for its general use and purposes.”**

*If you are unsure of the specific amount of money or other property you would like to leave De Marillac, you may leave all or a portion of the property remaining after the payment of your other bequests and estate administration expenses, often referred to as a “residuary bequest”:*

**“[Provisions for other beneficiaries.] All of the rest, residue and remainder of my estate, both real and personal property of whatever kind and whosoever situated, which I may own or have the right to dispose of at the time of my death, (my “residuary estate”) shall be disposed of as follows: I give, devise and bequeath \_\_\_\_ % of my residuary estate to De Marillac Academy, a California Religious Corporation, for its general use and purposes.”**

*A contingent bequest only benefits the school if the other named beneficiaries predecease the person making the Will:*

**“In the case of the failure or lapse of any legacy or devise herein such that the property so bequeathed or devised would otherwise pass by intestacy, I give, devise, and bequeath any such failed or lapsed legacy or devise to De Marillac Academy, a California Religious Corporation, for its general use and purposes.”**

*If you want to restrict your gift to a specific purpose, such as a student scholarship or endowment, we ask that you add the following in lieu of “for its general use and purposes”:*

**“to be used for [purpose]. If De Marillac Academy, in its sole judgment, determines that such purpose is no longer feasible, it may use the same for such related purposes as, in its sole judgment, will most nearly fulfill my original intention.”**

Thank you for your consideration.

Please contact the Development Office at 415.552.5220 with any questions.

The information contained on this page is not intended as legal, tax or investment advice. Before including any provisions in your Will, you should consult with an attorney, tax professional or investment professional, as appropriate, to review the tax consequences of your gift, the terms of your Will or other agreements, and the advisability of the gift in light of your overall financial circumstances and personal affairs.