



SAMPLE BEQUEST LANGUAGE

**Restricted and Unrestricted Bequests**

“I give and bequeath to Insight Meditation Society (IMS) located at 1230 Pleasant Street, Barre, MA 01005 the sum of \$\_\_\_\_\_ (or an accurate description of securities, real estate or other property given) for its general charitable purposes (or specify a program\*\*).”

**Percentage Bequest**

“I give and bequeath to Insight Meditation Society (IMS) located at 1230 Pleasant Street, Barre, MA 01005 for its general charitable purposes an amount equal to \_\_\_\_\_% of my gross estate, as finally determined for federal estate tax purposes.”

**Residual Bequest**

“All (or \_\_\_\_\_% of) the residue of my estate, including real and personal property, I give, devise, and bequeath to Insight Meditation Society (IMS) located at 1230 Pleasant Street, Barre, MA 01005 for its general charitable purposes.”

**Contingent Bequest**

“In the event that any of the above-named beneficiaries should predecease me, or that any of the above bequests shall otherwise not be effective, I give, devise, and bequeath to Insight Meditation Society (IMS) located at 1230 Pleasant Street, Barre, MA 01005 (tax-exempt ID#510-152-810) for its general charitable purposes all property which said beneficiary or beneficiaries would have received if said beneficiary or beneficiaries would have survived me.”

\*\*In the case of a restricted gift it is wise to include a saving or escape clause so that your gift can continue to be useful to IMS if conditions change in a way that would nullify or make impractical the original purpose. Consider adding the following language: “If at some future time, in the judgment of the Board of Directors of IMS, it is no longer practicable to use the principal of this bequest for the purposes intended, the Board of Directors have the right to use the income or principal for whatever purpose they deem necessary and most closely in accord with the intent described herein.”

**The tax ID number of the Insight Meditation Society is 510-152-810.**

*If you require assistance, please feel free to contact our Development Office at (978) 355-4378 ext. 230 or [development@dharm.org](mailto:development@dharm.org).*