



1884 LEGACY SOCIETY

ANNA JAQUES
COMMUNITY HEALTH FOUNDATION

A Gift Through Your Will

A bequest is the simplest way for many donors to make a noteworthy and lasting gift that will significantly help the health and well-being of our community. You can shape specific provisions into your bequest. Or, you can make an unrestricted gift that offers Anna Jaques Hospital the flexibility to use your funding where it is needed most. A bequest may also be made in honor or memory of another individual.

Types of Bequests and Specific Language

Outright bequest—An outright bequest may direct a specific dollar amount or specific assets such as securities, real estate, or tangible personal property (works of art, etc.)—or a stated percentage of an estate to Anna Jaques Community Health Foundation.

Expressed as a sum of money:

“I bequeath the sum of \$____ to Anna Jaques Community Health Foundation, tax ID# 04-3318952, located in Newburyport, Massachusetts, to be used or disposed of as Anna Jaques in its sole discretion deems appropriate.”

Expressed as a specific asset or item:

“I bequeath <DESCRIPTION OF PROPERTY (stock, etc.)> to Anna Jaques Community Health Foundation, tax ID# 04-3318952, located in Newburyport, Massachusetts, to be used by or disposed of as Anna Jaques in its sole discretion deems appropriate.”

Expressed as a percentage:

“I devise and bequeath (all/or____ %) of the remainder of my property to Anna Jaques Community Health Foundation, tax ID# 04-3318952, located in Newburyport, Massachusetts, to be used by or disposed of as Anna Jaques in its sole discretion deems appropriate.”

Residuary bequest—Through a residuary bequest Anna Jaques Community Health Foundation receives all or a percentage of the remainder of the estate after specific amounts bequeathed to other beneficiaries have been distributed and estate-related expenses have been paid.

“I devise and bequeath to Anna Jaques Community Health Foundation, tax ID# 04-3318952, located in Newburyport, Massachusetts, the rest, residue, and remainder of my estate, both real and personal, to be held, administered, and used by or disposed of as Anna Jaques in its sole discretion deems appropriate.”

Contingent bequest—This is a bequest made on condition that a certain event must occur before distribution to the beneficiary. A contingent bequest is specific in nature and fails if the condition is not met. A contingent bequest is also appropriate if you want to name a secondary beneficiary in case the primary beneficiary does not survive you.

“If [insert name(s)] does/do not survive me, I give and devise to Anna Jaques Community Health Foundation, tax ID# 04-3318952, located in Newburyport, Massachusetts, all the rest, residue, and remainder of my estate, both real and personal, to be held, administered, and used by or disposed of as Anna Jaques in its sole discretion deems appropriate.”

A bequest often allows people to make a gift that might not otherwise be possible—and a bequest may also significantly reduce state and federal estate taxes due at death. Finally, all bequest donors are recognized as members of the **Anna Jaques Community Health Foundation’s 1884 Legacy Society**.

THANK YOU FOR YOUR INTEREST IN A BEQUEST!

For more information please contact:

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When making any type of legacy gift, Anna Jaques Community Health Foundation advises that you consult your legal and financial advisors.

Tax ID# 04-3318952