

Congregation of St. Joseph
Sample Wills and Trust Language for Christ in the Wilderness, Inc.

The most common form of a planned gift is a bequest, which is in effect a gift made under your Last Will and Testament. Some donors may prefer to use Revocable (“Living”) Trusts as part of their estate plans to effect their testamentary gifts, which are referred to as distributions.

The Congregation of St. Joseph prefers all bequests (or distributions) for its sponsored ministries to be directed toward the congregation for use by the specified ministry. The sample language below will ensure that your desire to support Christ in the Wilderness, Inc. will be met.

In order to best maximize the use of your generous gift to Christ in the Wilderness, Inc., unrestricted gifts are most helpful to our ministries so they can be free to direct your gift toward their greatest need. Following you will find language for both unrestricted and restricted language for wills and trusts.

We recommend you print this document out and provide it to your attorney.

SPECIFIC WILLS/TRUST LANGUAGE

LANGUAGE FOR UNRESTRICTED GIFT USE

Language for a Gift of a Specific Dollar Amount Under Will

I give, devise and bequeath to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the “Congregation”), the sum of \$_____ [or property described herein] to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, in its discretion for its general purposes. If it is determined by the Leadership Team of the Congregation that all or part of the gift is no longer needed, or for any reason cannot be used for the general purposes of Christ in the Wilderness, Inc, then such portion of the gift may be used for the general purposes of such other ministry as the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original ministry selected.

Language for a Distribution of a Specific Dollar Amount
Pursuant to Revocable Trust

My trustee shall distribute to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the “Congregation”), the sum of \$_____ [or property described herein] to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, in its discretion for its general purposes. If it is determined by the Leadership Team of the Congregation that all or part of the gift is no longer needed, or for any reason cannot be used for the general purposes of Christ in the Wilderness, Inc, then such portion of the gift may be used for the general purposes of such other ministry as the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original ministry selected.

**Language for a Gift of the Residue or Percentage of the Residue
of an Estate Under Will**

I give, devise and bequeath all the residue of my estate [or ___ percent (____%) of the residue of my estate] to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the "Congregation"), to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, in its discretion for its general purposes. If it is determined by the Leadership Team of the Congregation that all or part of the gift is no longer needed, or for any reason cannot be used for the general purposes of Christ in the Wilderness, Inc, then such portion of the gift may be used for the general purposes of such other ministry as the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original ministry selected.

**Language for a Distribution of the Residue or Percentage of the Residue
of Trust Property Pursuant to Revocable Trust**

My trustee shall distribute to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the "Congregation"), the residue of my trust property [or ___ percent (____%) of the residue of my trust property] to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, in its discretion for its general purposes. If it is determined by the Leadership Team of the Congregation that all or part of the gift is no longer needed, or for any reason cannot be used for the general purposes of Christ in the Wilderness, Inc, then such portion of the gift may be used for the general purposes of such other ministry as the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original ministry selected.

LANGUAGE FOR RESTRICTED PROVISIONS

Language for a Gift of a Specific Dollar Amount Under Will For a Specific Purpose

I give, devise and bequeath to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the "Congregation"), the sum of \$_____ [or property described herein] to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, for the following purpose: _____
_____. If it is determined by the Leadership Team of the Congregation that all or part of the bequest is no longer needed, or for any reason cannot be used for the stated purpose, then such portion of the bequest may be used by Christ in the Wilderness (or the Congregation or another affiliated corporation) for other related purposes, which the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original purposes described above.

**Language for a Distribution of a Specific Dollar Amount
Pursuant to Revocable Trust For a Specific Purpose**

My trustee shall distribute to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the "Congregation"), the sum of \$_____ [or property described herein] to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, for the following purpose:_____.

_____ . If it is determined by the Leadership Team of the Congregation that all or part of the distribution is no longer needed, or for any reason cannot be used for the stated purpose, then such portion of the distribution may be used by Christ in the Wilderness (or the Congregation or another affiliated corporation) for other related purposes, which the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original purposes described above.

**Language for a Gift of the Residue or Percentage of the Residue
of an Estate Under Will For a Specific Purpose**

I give, devise and bequeath all the residue of my estate [or _____ percent (____%) of the residue of my estate] to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the "Congregation"), to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, for the following purpose: _____.

_____ . If it is determined by the Leadership Team of the Congregation that all or part of the bequest is no longer needed, or for any reason cannot be used for the stated purpose, then such portion of the bequest may be used by Christ in the Wilderness (or the Congregation or another affiliated corporation) for other related purposes, which the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original purposes described above.

**Language for a Distribution of the Residue or Percentage of the Residue of Trust Property Pursuant
to Revocable Trust For a Specific Purpose**

My trustee shall distribute to the Congregation of the Sisters of St. Joseph, Inc., a West Virginia corporation, or its successor (the "Congregation"), the residue of my trust property [or _____ percent (____%) of the residue of my trust property] to be used by Christ in the Wilderness, Inc., an affiliated Illinois corporation, or its successor, for the following purpose: _____.

_____ . If it is determined by the Leadership Team of the Congregation that all or part of the distribution is no longer needed, or for any reason cannot be used for the stated purpose, then such portion of the distribution may be used by Christ in the Wilderness (or the Congregation or another affiliated corporation) for other related purposes, which the Leadership Team deems to be in the best interests of the Congregation, giving consideration to the original purposes described above.

MEMORIAL GIFTS

Many people like to make gifts and distributions that are in memory of a loved one. The additional words “in loving memory of [NAME]” or “in thanksgiving for the life of [NAME]” may be added at the end of any gift or distribution instructions.

If you would like to apply any conditions to your gift or distribution, we recommend that you contact us to discuss appropriate language to be certain that your wishes may be carried out.

Pat Milenius

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The Congregation of St. Joseph and Christ in the Wilderness, Inc., do not provide legal, tax or financial advice. We strongly recommend that you consult professional advisors on all legal, tax or financial matters, including gift planning considerations. To ensure compliance with certain IRS requirements, we disclose to you that this communication (including any attachments) is not intended or written to be used, and cannot be used, for the purpose of avoiding tax-related penalties.