



## Support UHAB

### Planned Giving: Sample Bequest Language

You can include the Urban Homesteading Assistance Board in your will in several ways:

1. The most common method is to include a **bequest** for:

- a percentage of your estate,
- a specific dollar amount, or
- the residue of your estate after providing for others

One beautiful way to think of all of the people you'd like to help is to think of them as one of your children, and distribute your estate among your children and loved ones or charities.

2. You may also name the Urban Homesteading Assistance Board as a **contingent beneficiary** in the event that other beneficiaries predecease you.
3. Another thoughtful arrangement is to establish a **trust in your will** that provides lifetime income for a loved one with the remainder eventually going to the Urban Homesteading Assistance Board.

For the purposes of including the Urban Homesteading Assistance Board in your will, our legal name is "**Urban Homesteading Assistance (U-hab)**". The Urban Homesteading Assistance Board is a 501(3)c nonprofit organization and our tax identification number is 13-2902798.

By including the Urban Homesteading Assistance Board in your will you are helping to promote the development and preservation of affordable housing for all people in need of decent housing in New York City.

### **Sample Bequest Provisions**

Everyone's will is a very personal document. Its provisions depend on their wishes and circumstances. Perhaps one of these provisions will be helpful for you:

#### **Gift of a Percent of One's Estate**

I give to the Urban Homesteading Assistance (U-hab), Inc. a New York nonprofit corporation, tax identification number 13-2902798, with its offices currently located at 120 Wall Street, 20<sup>th</sup> floor, New York, NY 10005, \_\_\_\_ % of my estate for its general purposes.

#### **Specific Legacy**

I bequeath \_\_\_\_\_ (name a specific asset, such as a home, farm, livestock, stocks, mutual funds, etc.) to the Urban Homesteading Assistance (U-hab), Inc. a New York nonprofit corporation, tax identification number 13-2902798, with its offices currently located at 120 Wall Street, 20<sup>th</sup> floor, New York, NY 10005, for its general purposes.

#### **Gift for a Specific Purpose**

I give to the Urban Homesteading Assistance (U-hab), Inc. a New York nonprofit corporation, tax identification number 13-2902798, with its offices currently located at 120 Wall Street, 20<sup>th</sup> floor, New York, NY 10005, the sum of \$ \_\_\_\_\_ (or \_\_\_\_ % of my estate; or the property herein described) to be used for \_\_\_\_\_ (specify the purpose).

#### **Gift of Remainder after Other Bequests Have Been Made**

All the rest, residue, and remainder of my estate, both real and personal, I give to the Urban Homesteading Assistance (U-hab), Inc. a New York nonprofit corporation, tax identification number 13-2902798, with its offices currently located at 120 Wall Street, 20<sup>th</sup> floor, New York, NY 10005.

#### **Contingency Gift**

I give to the residue of the property owned by me at my death, real and personal, to my wife, (husband) \_\_\_\_\_, if she, (he) survives me. If my wife (husband) does not survive me, I give my residuary estate to the Urban Homesteading Assistance (U-hab), Inc. a New York nonprofit corporation, tax identification number 13-2902798, with its offices currently located at 120 Wall Street, 20<sup>th</sup> floor, New York, NY 10005.

#### **Final Contingency Beneficiary**

I give the residue of the property owned by me at my death, real and personal to my above-named beneficiaries, if they survive me. If my above-named beneficiaries do not survive me, I give my residuary estate to the Urban

Homesteading Assistance (U-hab), Inc. a New York nonprofit corporation, tax identification number 13-2902798, with its offices currently located at 120 Wall Street, 20<sup>th</sup> floor, New York, NY 10005.

**A Double-Purpose Bequest**

You can provide a relative or friend with income for life through a special gift to the Urban Homesteading Assistance Board. You can do this by establishing a charitable trust through your Will. Upon your death, the trust pays income to the person you designate. After that person's death, whatever remains in the trust passes to the Urban Homesteading Assistance Board.

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