

# ***St. Louis County Library Foundation Suggested Will and Trust Gift Language***

Thank you for considering a planned gift or estate gift to the St. Louis County Library Foundation for the benefit of the Library. Gifts of all sizes are welcome, appreciated and have impact in furthering life-long learning opportunities for all St. Louis County residents.

For planning purposes, the following suggested language is broken down into two categories:

- 1) Gifts projected or estimated to be **\$50,000 or more** for a name Literary Legacy Fund dedicated purpose, and
- 2) Gifts for the Library Foundation to be used where needed most and gifts projected or estimated to be **less than \$50,000**.

## **Named Fund Gift/Bequest Language for Gifts of \$50,000 or more**

*I give and bequeath [the rest and residue / % share of residue / sum of \_\_\_\_\_ dollars / etc.] of my estate to the St. Louis County Library Foundation, a Missouri nonprofit corporation, for its charitable purposes as part of the Foundation's named funds and administered for the purpose's described in the gift agreement signed by me and previously delivered to the Foundation.*

*In the event that circumstances make the specified use or administration of this gift no longer practical or desirable, the Board of Trustees/Directors of the Foundation are hereby authorized to make changes in the use or administration of this gift to maintain, as much as is reasonably possible, its spirit and general intent.*

## **Gift/Bequest Language for Undesignated Purpose Gifts and Gifts Under \$50,000**

*I give and bequeath [the rest and residue / % share of residue / sum of \_\_\_\_\_ dollars / etc.] of my estate to the St. Louis County Library Foundation, a Missouri nonprofit corporation, for its charitable purposes as the Board of Trustees/Directors of the Foundation shall determine.*

***St. Louis County Library Foundation***  
***Literary Legacy Society***  
***Notice of Intention***

**I(A). Lifetime Gift**

As of \_\_\_\_\_, I/we \_\_\_\_\_  
(Date) (Please print name or names)

am/are pleased to make a gift of \$\_\_\_\_\_ (actual or estimated value) for the purpose(s) stated below.

**AND/OR**

**I(B). Estate Gift (Will/Trust) or Other Deferred Gift**

As of \_\_\_\_\_, I/we \_\_\_\_\_  
(Date) (Please print name or names)

am/are pleased to acknowledge that I/we have named St. Louis County Library Foundation as a beneficiary in my/our will, trust, retirement plan, or life insurance policy.

I/We understand that this is a non-binding statement. Although I/we intend this legacy to remain in force, this document in no way constitutes a legally binding or enforceable pledge.

Optional, but very helpful to the Library Foundation:

The estimated value of my/our gift is \$\_\_\_\_\_ (or \_\_\_% of my/our residuary estate, which gift would be approximately, currently valued at \$\_\_\_\_\_). Some form of documentation, such as a page from your will, beneficiary designation form, etc. will be appreciated, but is not required.

Description of any non cash assets specifically left to St. Louis County Library Foundation:

\_\_\_\_\_

Name & Contact Information for Attorney or Other Advisor:

\_\_\_\_\_

\_\_\_\_\_

AND

## II. Gift Agreement for Gifts of \$50,000 or More

I/we would like the name of my/our fund to be: \_\_\_\_\_

I/we would like my/our fund to be used for (select one):

- Early Childhood Literacy
- Collection Development and Technology
- Community Enrichment
- Capital Improvements
- General Endowment

Submission of this *Notice of Intention* enrolls you as a member of the *Literary Legacy Society*. The Membership List of the *Literary Legacy Society* will be published from time to time in both Library and Library Foundation publications. However, **the nature and size of any legacy intention to St. Louis County Library Foundation will be kept strictly confidential.** [Check here \_\_\_ if you prefer to remain completely anonymous.]

Printed Name 1: \_\_\_\_\_

Signature 1: \_\_\_\_\_

Printed Name 2: \_\_\_\_\_

Signature 2: \_\_\_\_\_

Please return this form to:

James Bogart, Foundation Director  
St. Louis County Library Foundation  
1640 S. Lindbergh Blvd.  
St. Louis, MO 63131

Phone: 314-994-3300

Fax: 314-997-7602