**SUGGESTED BEQUEST LANGUAGE TO BENEFIT ASHRAE FOUNDATION**

When making or revising a will, a donor should obtain the assistance of an attorney. Members of ASHRAE Foundation’s Development Office will be pleased to work with you and your attorney to design an estate plan specifically tailored to your wishes. The following are suggested forms for making various types of bequests:

**1. Outright Bequest in Will (unrestricted)**

 ***a.*** ***Specific Dollar Amount:***

The

“I bequeath the sum of $\_\_\_\_\_\_\_\_ to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 to be used or disposed of as the organization in its sole discretion deems appropriate.”

***b. Percentage Amount:***

“I bequeath ( \_\_\_\_\_ percent) of my estate to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 to be used or disposed of as the organization in its sole discretion deems appropriate.”

 ***c.* *Specific Property (Personal Property):***

“I bequeath (describe property) to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 to be used or disposed of as the organization in its sole discretion deems appropriate.”

***d. Specific Property (Real Estate):***

“I devise all of my right, title, and interest in and to real estate located at (give address and describe property) to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 to be used or disposed of as the organization in its sole discretion deems appropriate.”

 ***e. Share of or Entire Residue of Estate:***

“I devise and bequeath (all) ( \_\_\_\_\_ percent) of the remainder of my property to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 to be used or disposed of as the organization in its sole discretion deems appropriate.”

**2. Conditional Bequest in Will**

Insert the conditional language in one or more of the above provisions. For example:

“If my husband (wife) does not survive me, I bequeath the sum of $\_\_\_\_\_\_\_\_ to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 to be used or disposed of as the organization in its sole discretion deems appropriate.”

**3. Restricted Use**

If the gift to ASHRAE Foundation is for a purpose other than the organization’s unrestricted use, insert the restriction in place of the words “to be used or disposed of as the organization in its sole discretion deems appropriate.” For example:

“I bequeath the sum of $\_\_\_\_\_\_\_\_ to the ASHRAE Foundation, a Georgia non-profit corporation having a principal place of business at 1791 Tullie Cir. Atlanta, GA 30329, Federal Tax Identification Number 58-6274320 for the following use:

“\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.”

In the event of a gift subject to a restriction, we suggest including one of the following provisions:

“However, I impose no legal or equitable obligation in this regard” or,

“If in the judgment of the ASHRAE Foundation it becomes, or is likely to become, impossible or impractical to accomplish the purposes of this gift, the income or principal, or both, may be used for such related purposes and in such manner as determined by the ASHRAE Foundation.”