



American  
Heart  
Association.

# Bequest Language for your Clients

Proper wording in your clients' estate plan is key to ensuring their wishes are carried out correctly.

Use our sample bequest language so your clients' gift is accurately directed through their will or trust.

## Sample Bequest Language

### General Purpose Specific Bequest

I give, devise, bequeath, \_\_\_\_\_ (insert dollar amount or item of property to be donated) to the American Heart Association, Inc., or its successor organization, a nonprofit corporation as described in section 170(c) of the Internal Revenue Code, with a tax-identification number of 13-5613797 and with national headquarters located at 7272 Greenville Avenue, Dallas, Texas 75231, to be used for fighting cardiovascular diseases and stroke.

### General Purpose Residuary Bequest

I give, devise, bequeath, \_\_\_\_\_ (insert % amount) of all the rest, residue and remainder of my estate to the American Heart Association Inc., or its successor organization, a nonprofit corporation as described in section 170(c) of the Internal Revenue Code, with a tax-identification number of 13-5613797 and with national headquarters located at 7272 Greenville Avenue, Dallas, Texas 75231, to be used for fighting cardiovascular diseases and stroke.

### Restricted Purpose Bequest

I give, devise, bequeath, \_\_\_\_\_ (insert dollar amount, item of property or % of residue) to the American Heart Association Inc., or its successor organization, a nonprofit corporation as described in section 170(c) of the Internal Revenue Code, with a tax-identification number of 13-5613797 and with national headquarters located at 7272 Greenville Avenue, Dallas, Texas 75231 to be used exclusively [insert restricted use language here such as: for research, for CPR training, in the state of Maine, etc.].

Your clients' legacy gift is important and personal to them, and using the correct language will ensure their gift to the American Heart Association can be used exactly as intended.

For more information, contact us at 888-227-5242, [plannedgiving@heart.org](mailto:plannedgiving@heart.org), or visit [Heart.org/plannedgiving](https://www.heart.org/plannedgiving).