



Visitation School

ADVANCEMENT OFFICE

Sample Language for Will

The following are recommended clauses that may be used to make a gift to Convent of the Visitation School through your will or revocable living trust.

1. General Unrestricted Bequest

"I give, devise and bequeath to Convent of the Visitation School, Mendota Heights, Minnesota 55120, (percentage of residue, sum, or description of property), the principal and income of which shall be used for such Visitation School purposes as the Board of Trustees may determine."

2. Specific Program - But Unrestricted as to Use

"I give, devise and bequeath to Convent of the Visitation School, Mendota Heights, Minnesota 55120, (percentage of residue, sum, or description of property), the principal and income of which shall be distributed by the Board of Trustees to the (name of Program or Department) for use where the need is greatest."

3. Restricted - to be used only for scholarships

"I give, devise and bequeath to Convent of the Visitation School, Mendota Heights, Minnesota 55120, (percentage of residue, sum, or description of property), the principal and income of which shall be distributed by the Board of Trustees as scholarships to students enrolled in the school."

4. Bequest of Residue - after all other bequests are made

"All [or a portion of] of the rest, residue, and remainder of my estate, both real and personal, of every kind and description, wherever situated and whether now owned or hereafter acquired, including any power of appointment, I give, devise, and bequeath to Convent of the Visitation School, Mendota Heights, Minnesota 55120, the principal and income of which shall be used for such School purposes as the Board of Trustees may determine."

5. Contingent Bequest - if other bequests cannot be completed

"In the case of a failure or lapse of any legacy or devise herein such that the property so bequeathed or devised would pass by intestacy, I direct that in lieu thereof such property shall pass to Convent of the Visitation School, Mendota Heights, Minnesota 55120, to be known as the (name) Fund, the principal and income of which shall be used for such School purposes as the Board of Trustees may determine."

OR

"If [none of] the above person[s] survive[s] me, or if there is no one in existence who is a member of the class of persons designated in paragraph [], I give, devise and bequeath such property to Convent of the Visitation School, Mendota Heights, Minnesota 55120, to be known as the (name) Fund, the principal and income of which shall be used for such School purposes as the Board of Trustees may determine."

6. Addition to Endowment Fund

"I give, devise and bequeath to Convent of the Visitation School, Mendota Heights, Minnesota 55120, the sum of \$ _____ Dollars (or otherwise describe the gift) and direct that this bequest be added to the (name) Endowment Fund."

This information is not intended as legal or tax advice. For legal advice, please consult an attorney.

Non Scholae, Sed Vitae: Not for School, but for Life