



Below please find examples of specific language that you may use to name Susan G. Komen New England as a beneficiary of your will, trust, life insurance policy, retirement assets, or other contractual gifts. If you, your attorney or financial advisor has any questions, please do not hesitate to contact us at [info@KomenNewEngland.org](mailto:info@KomenNewEngland.org).

#### A. GIFTS UNDER A WILL

The following language is an example of wording that may be used to name Komen New England as a beneficiary of your last will and testament. You may either make a general or restricted gift for education, screening, or treatment support. In addition such gift may be of a specific dollar amount or it may also be of a percentage of your estate. If you wish to make a restricted gift to Komen New England, please contact us at the phone number or email address above prior to finalizing your gift.

a. GENERAL TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: I hereby give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to Susan G. Komen® New England, of Farmington, CT to be used for general purposes. In the event that Susan G. Komen New England is not in existence at the time of my death, then I hereby give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to the national headquarters of Susan G. Komen®, of Dallas, Texas, to be used for general purposes in the former service area of Susan G. Komen New England.

b. GENERAL TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: I hereby give and bequeath \_\_\_\_\_ percent (\_\_\_\_%) of the rest and residue of my estate to Susan G. Komen® New England, of Farmington, CT to be used for general purposes. In the event Susan G. Komen New England is not in existence at the time of my death, then I hereby give and bequeath \_\_\_\_\_ percent (\_\_\_\_%) of the rest and residue of my estate to the national headquarters of Susan G. Komen®, of Dallas, Texas, to be used for general purposes in the former service area of Susan G. Komen New England.

c. RESTRICTED TESTAMENTARY GIFT: SPECIFIC MONETARY AMOUNT: I hereby give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to Susan G. Komen® New England, of Farmington, CT to be used for [insert donor restriction]. In the event Susan G. Komen New England is not in existence at the time of my death, then I hereby give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to the national headquarters of Susan G. Komen®, of Dallas, Texas, to be used for [insert donor restriction] in the former service area of Susan G. Komen New England.

d. RESTRICTED TESTAMENTARY GIFT: PERCENTAGE OF RESIDUE OF ESTATE: I hereby give and bequeath \_\_\_\_\_ percent (\_\_\_\_%) of the rest and residue of my estate to Susan G. Komen® New England, of Farmington, CT to be used for [insert donor restriction]. In the event Susan G. Komen New England is not in existence at the time of my death, then I hereby give and bequeath \_\_\_\_\_ percent (\_\_\_\_%) of the rest and residue of my estate to the national headquarters of Susan G. Komen®, of Dallas, Texas, to be used for [insert donor restriction] in the former service area of Susan G. Komen New England.

#### B. GIFTS FROM A TRUST

The following language is an example of wording that may be used in the event Komen New England is named as a contingent beneficiary of a trust estate. Please keep in mind that such



gifts may also be restricted and may be of either a specific dollar amount or a percentage of the trust estate.

[Insert contingency], the Trustee shall distribute \_\_\_\_\_ Dollars (\$\_\_\_\_\_) to Susan G. Komen® New England, of Farmington, CT, free and clear of trust, to be used for general purposes. In the event Susan G. Komen New England is not in existence at the time of this distribution, the Trustee shall distribute \_\_\_\_\_ Dollars (\$\_\_\_\_\_) to the national headquarters of Susan G. Komen®, of Dallas, Texas, free and clear of trust, to be used for general purposes in the former service area of Susan G. Komen New England.

#### C. CONTRACTUAL GIFTS

Komen New England may be named as the beneficiary of an asset that passes outside the terms of a will or a trust (e.g. life insurance, IRA, 401(k)). In order to clarify the intention of the donor, the contractual instrument governing the asset should set forth the following as the official recipient of the gift:

Susan G. Komen® New England, of Farmington, CT. In the event that Susan G. Komen New England is not in existence, then to the national headquarters of Susan G. Komen®, of Dallas, Texas, for the benefit of the former service area of the Susan G. Komen New England.

#### D. GENERAL INFORMATION

Below please find some general information that may be beneficial to you in finalizing your estate plan.

Legal Name: Susan G. Komen Breast Cancer Foundation, Connecticut Affiliate d/b/a Susan G. Komen New England

Incorporation Details:

- 501(c)(3) organization, classified as a public charity, exempt from federal income tax
- \_\_\_\_\_ non-profit corporation

Mailing Address: Susan G. Komen New England, 74 Batterson Park Road, Farmington, CT, 06032