



Bequest Language

SUGGESTED BEQUEST WORDING

A bequest is simple and convenient. You have a number of options.

You can make a bequest for a specific dollar amount or for a percentage of your estate. You can designate your bequest for general use or you can restrict its use. Many individuals establish endowments that honor the memory of a family member or another loved one. These endowments live forever, since only the income is used annually. Because a will is an important legal document, you should seek an attorney's help. To assist you with this important process, we offer some suggested bequest wording below.

Following are some examples of various types of bequests:

Specific bequests are used to make a gift of a specific dollar amount or specific assets, such as securities, real estate, or personal property.

Residuary bequests are used to give all or a portion of the rest, residue, and remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.

Including Disabled American Veterans in your will

The following includes several examples of suggested bequest wording to benefit Disabled American Veterans.

Each individual situation is unique and, therefore, these examples include only some of the possible gift opportunities. We encourage you to share your final will provision with Disabled American Veterans to ensure that your wishes will be properly followed and recognized.

Percentage of estate for unrestricted purposes

I give, devise, and bequeath to Disabled American Veterans, P.O. Box 14301, Cincinnati, OH 45250-0301, _____ percent (%) of the rest, residue, and remainder of my estate as an unrestricted gift to be used at the discretion of the Board of Directors of Disabled American Veterans for the general purposes of Disabled American Veterans, P.O. Box 14301, Cincinnati, OH 45250-0301.

Specific amount for unrestricted purposes

I give, devise, and bequeath to Disabled American Veterans, P.O. Box 14301, Cincinnati, OH 45250-0301, the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used at the discretion of the Board of Directors of Disabled American Veterans for the general purposes of Disabled American Veterans and its related entities.

Specific amount for specific purposes

I give, devise, and bequeath to Disabled American Veterans, P.O. Box 14301, Cincinnati, OH 45250-0301, the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used for _____ at Disabled American Veterans.

If changed circumstances should at some future time make it impractical to continue using the income from the Fund for the purpose designated, then the Disabled American Veterans Board of Directors may re-designate the purpose to adhere as closely as possible to my original intent.

To assist you with your plans, Disabled American Veterans can provide sample language for the program or area you wish to support. This confidential service is available to you without obligation.

Designating the purpose of a bequest:

Unrestricted: The most useful type of bequest is unrestricted, allowing the funds to be allocated by DAV wherever the need is greatest.

Restricted: You may designate your bequest to support a special program or purpose that reflects your personal or professional interest.

Bequests for the Endowment Fund

Bequests specified for the DAV Endowment Fund are especially appreciated. If you would like your gift to benefit DAV programs for generations to come, please add this language: "The bequest is to be used for the DAV Endowment Fund, with only the interest and dividends used to fund ongoing DAV programs."

If the bequest is restricted to a specific purpose, it is important that the following wording be added at the end of the provision. This will ensure that, in the remote possibility a field of study or specified purpose may cease to need funds in the future, an alternate use for the bequest may be determined.

"... for so long as the Board of Directors of Disabled American Veterans determines that the need exists. Should the need no longer exist, said Board of Directors may, in its sole discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above."

Bequests that honor loved ones: Any bequest can be further personalized to honor or memorialize a friend or loved one. Just add a phrase indicating that the bequest is "in honor of/ in memory of (name)." By notifying our offices of your intentions, that individual's name—along with your own—can be included in recognition through The DAV Guardian Society.

Disabled American Veterans' Tax Identification # is 31-0263158.