

My Benevolent Wishes™

*If you have questions regarding the use of this form, please contact
Borchers Law, P.C. and we will be happy to assist you.*

To the Donor:

PURPOSE

This expression of your charitable, benevolent or goodwill intentions is to be used to supplement what you are distributing through your will or trust. It is intended to be easily amended as circumstances change, to allow your beneficiaries to participate in the giving you have in mind more fully, and to allow them to take any charitable write offs that may apply.

NON-BINDING DOCUMENT

Any charitable intentions that you designate on this form are only suggestions. Similar to a letter or memo you may leave regarding the distribution of your personal effects, this form is “morally persuasive” but it does not legally bind anyone. Only your will or trust will bind your heirs to a particular distribution.

Therefore, if you desire to make your charitable intentions mandatory, your Trust, or Will, will need to be amended to incorporate your wishes. Please contact Borchers Law, P.C. and we will assist you.

RECOMMENDED LIMITATION ON USE

In general, we recommend that distribution suggestions made in this Memorandum not exceed the greater of \$10,000 or 10% of the aggregate value of your estate. Amounts that you wish to give that are greater than these values should be mentioned or specified in your last will and testament or trust instruments. You may refer in your trust or last will to this form with the advice of qualified legal counsel.

To the Beneficiary:

If you have questions regarding the intended use and interpretation of this form, please contact Borchers Law, P.C. and we will be happy to assist you.

LEGAL NOTICE: The user of this form does so at his or her risk. No attorney-client relationship is created in the use of this form between Borchers Law, P.C. or its attorneys and the donor or the charities named in this form. No advice is offered and any estate planning or charitable giving facilitated or directed by the use of this form is best done with the advice of qualified legal and tax counsel.

From the Office of: **Borchers Law, P.C.** Estate Protection and Planning
77 Main Street, Medway, MA 02053. Tel. (508) 803-1900. www.borcherslaw.com

To My Beneficiaries:

I am leaving the assets I have left at my death to you, my heirs or beneficiaries. I hope that this inheritance enables you to have resources to put to good use, to enjoy, *and* to continue or in some cases complete my giving. It is in this spirit that I make these wishes known.

Life has taught me that giving to others in need and to causes I believe in improves our world, even if only in my limited sphere of influence, modestly, or for a limited time. Giving has also benefited me and I believe it will do the same you when you are involved in giving freely of yourself, your time, your talent and your resources.

I may specify causes or even individuals I would like receive some benefit, **even though they do not constitute tax-deductible charitable gifts**. Not all non-profit entities are organizations described as charities under the Internal Revenue Code. Any income tax charitable deduction that is available for these gifts may be claimed by you equally, or if you designate which of you shall actually make the gifts in order to take advantage of such income tax charitable deductions, then in accordance with your respective gifts.

You may decide, on your own, **how to give away the amounts** I have specified above if for any reason the charities, causes or persons noted above are no longer appropriate when considered in light of what you know or learn of my most recent thoughts and intentions. In addition, persons making a gift in my memory need not give specifically to my causes. Give for the good of others beyond yourselves alone. Gifts may also be made anonymously and need not mention my name or the family name or names.

The **amounts stated may be altered as well**, but I would prefer that my heirs to be at least as generous as I have suggested here. I do not intend that the suggestions made in this Memorandum exceed the greater of \$10,000 or 10% of the aggregate value of my estate at the time of my death.

My heirs or beneficiaries may also take this opportunity to make gifts that are for causes, beliefs, purposes and benevolence that they choose, using some or even all of the money I have suggested above, as long as they choose wisely, do not support a particular party or political campaign or action committee, and do not knowingly contradict my own feelings.

Unless it is an obvious error or oversight on my part, if I have mentioned any of the charities or donees in the attached list in my will or trust documents, the listing here is an additional gift.

Give cheerfully and enjoy seeing the results!
Thank you for remembering me in this way!

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By way of expressing my charitable or benevolent intentions, but not creating any binding disposition to be made at my death hereby, I request that my heirs and/or the individual residuary beneficiaries* of my will or trusts that I leave make the following gifts in my memory, in the aggregate, as follows:

<u>Name</u>	<u>Dollar Amount</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I may amend this list or this entire document from time to time.

Witness my hand this ____ day of _____, 20____.

Signed: _____

* By the "residuary" beneficiaries I mean those who receive the balance of my estate (whether under my will, under any trusts created by me or in my control or influence, by way of annuity, retirement plan or life insurance payout, or other benefits payable or received in cash or in kind on my death) after the payment of debts, taxes and expenses of administration of my estate.