



Barth Syndrome Foundation

Learn About Wills and Bequests

What are the benefits of making a bequest?

1. You leave a lasting legacy to be remembered.
2. You lessen the burden of taxes on your family.
3. You may receive estate tax savings.

How can I learn more?

Contact us, by email – emily.milligan@barthsyndrome.org
Or by phone - 855-662-2784 or 855-NO-BARTH

How do I make a bequest?

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift be made to the Barth Syndrome Foundation as part of your estate plan.

What are my options?

1. A bequest can be made in several ways:
2. You can gift a specific dollar amount or asset.
3. You can gift a percentage of your estate.
4. You can gift from the balance or residue of your estate.
5. You can make a beneficiary designation of certain assets.

Samples of Bequest Language

A gift to BSF in your will or revocable trust enables you to support our mission and make a difference in the lives of future generations. A bequest is easy to arrange, will not alter your current lifestyle in any way, and can be easily modified to address your changing needs. Below is some sample gift language to make a gift to BSF through your will, trust, or retirement plan.

Residual Gift Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

"I give and devise to the Barth Syndrome Foundation (Tax ID #22-3755704), all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program)."

Specific Gift Language

Naming the Barth Syndrome Foundation as a beneficiary of a specific amount from your estate is easy:

"I give and devise to the Barth Syndrome Foundation (Tax ID #22-3755704), the sum of \$ _____ to be used for its general support (or for the support of a specific fund or program)."

Contingent Gift Language

BSF can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

"If (insert name) is not living at the time of my demise, I give and devise to the Barth Syndrome Foundation (Tax ID #22-3755704), the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program)."

Retirement Plan Beneficiary Language

You may name the Barth Syndrome Foundation as a beneficiary of your IRA or other qualified retirement benefits. You may wish to consult with your tax advisor regarding the tax benefits of such gifts.