

SAMPLE BEQUEST WORDING

A Charitable Bequest is a gift arranged under your Will that becomes available to the charity or charities that you choose, after your lifetime. The following are samples of language that can be included in your will. Please consult a lawyer, financial advisor or estate planner to review any wording in your will.

Specific, unrestricted:

I give to the Canadian Mental Health Association, National, currently of 500-250 Dundas St W, Toronto, ON M5T 2Z5 the sum of \$ _____ to be used at the discretion of the organization.

Specific, restricted:

I give to the Canadian Mental Health Association, National, currently of 500-250 Dundas St W, Toronto, ON M5T 2Z5 the sum of \$ _____ to be used for the following purpose(s): _____. If the Canadian Mental Health Association, National is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used at the discretion of the organization.

General % unrestricted:

I give to the Canadian Mental Health Association, National, currently of 500-250 Dundas St W, Toronto, ON M5T 2Z5 ___ % of the residue of my estate to be used at the discretion of the organization.

General % restricted:

I give to the Canadian Mental Health Association, National, currently of 500-250 Dundas St W, Toronto, ON M5T 2Z5 ___ % of the residue of my estate to be used for the following purpose(s): _____. If the Canadian Mental Health Association, National is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used at the discretion of the organization.

Residual contingent trust:

Upon the death of the survivor of my (wife, husband, etc.) _____ and my (son, daughter, etc.) _____, I direct my trustee to transfer and deliver the balance of the residue of my estate, including any undistributed income, to the Canadian Mental Health Association, National, currently of 500-250 Dundas St W, Toronto, ON M5T 2Z5 to be used at the discretion of the organization.

Legal Name Canadian Mental Health Association, National

Legal Address 250 Dundas St. West, Suite 500, Toronto, ON M5T 2Z5

Charitable Registration Number 10686 3657 RR0001

Adding a Codicil to an Existing Will

If you have already made a Will you can still help the Canadian Mental Health Association by adding a codicil to your existing Will. Please consult your legal advisor before completing a codicil. Please do not write on or amend your current Will, or it could become invalid.

This is a codicil to the Last Will and Testament of me, _____, of the City of _____, in the Province of _____, which will is dated the ____ of _____, 20__.

I add the following provision to this my Will, after Paragraph (or clause) ____:

Prior to the disposition of the residue of my estate, I direct my Executor/Trustee to transfer to the Canadian Mental Health Association, National currently of 500-250 Dundas St W, Toronto, ON M5T 2Z5 [____ % or \$_____] of my estate for the general purposes of the said organization and I declare that the receipt of the person who professes to be the proper person to receive this gift shall be a sufficient discharge thereof.

In all other respects I confirm my Will.

IN TESTIMONY WHEREOF, I have to this Codicil to my Will, written upon this page my name this ____ day of _____, 20__.

TESTATOR'S SIGNATURE

Witness

Witness