Leaving a Legacy: Caring for Creation

For many people, including a bequest as part of their written will is the simplest way to make a legacy gift to A Rocha. With that in mind, this information is provided as a general introduction. ***For specific questions regarding your personal situation, please consult an attorney.***

1. Your first step is to make a plan, in the form of a written will or a modification of an existing will. Your plan should be developed in consultation with qualified legal counsel.

2. Next, consider what type of bequest makes sense for you. There are three main types of bequests. Your legal/estate planning professional can help you identify and adopt the appropriate type for you.

    a. Specific Bequest
        Your written will designates the specific dollar amount, the specific percentage, or the specific property/asset you wish to go to A Rocha.

    b. Residual Bequest
        Your will instructs that after all taxes, legal/accounting expenses and other specific personal and/or charitable bequests have been paid, the remaining amount (the "residue") goes to A Rocha and any other organization(s) you specify.

    c. Contingent Bequest
        Your will can be written to specify certain conditions which must be met before a bequest is transferred to A Rocha. This type of bequest is typically designed to address a personal "what if" scenario. For example, if an individual who is to receive a bequest under your will is no longer living at the time of your death, then you may specify that the bequest originally designated for them would go instead to a designated charity.

        Depending on your specific situation, you might choose to implement some combination of these three main types of bequests in your will.

3. Sample language for your A Rocha bequest.

    Specific bequest example #1:

    "I hereby give and bequeath to A Rocha USA, Inc., a non-profit corporation whose principal office is located at P.O. Box 1338, Fredericksburg, TX 78624, tax I.D.#31-1751509, the sum of $_____ to be used for its general purposes."

    Specific bequest example #2 (percentage):

"I hereby give and bequeath to A Rocha USA, Inc., a non-profit corporation whose principal office is located at P.O. Box 1338, Fredericksburg, TX 78624, tax I.D.#31-1751509, ____% of my estate to be used for its general purposes."

Specific bequest example #3 (designated asset(s)):

"I hereby give and bequeath to A Rocha USA, Inc., a non-profit corporation whose principal office is located at P.O. Box 1338, Fredericksburg, TX 78624, tax I.D.#31-1751509, _____ to be used for its general purposes." [fill in a written description of a specific investment, insurance or bank account, real property or other asset(s).]

Residual bequest example:

"I hereby give and bequeath to A Rocha USA, Inc., a non-profit corporation whose principal office is located at P.O. Box 1338, Fredericksburg, TX 78624, tax I.D.#31-1751509, all of the rest, residue and remainder of my estate, both real and personal, after providing for the specific provisions of this Will, to be used for its general purposes."

In the above Residual Bequest example, if the intended gift is to be less than 100% of the residue, then the phrase "all of the rest" would be replaced with, "___% of the rest."

4. Correctly Identify the Beneficiary Organization(s) in Your Will

By using precise language to describe the organization(s) that will receive legacy gifts under your will, you can help simplify the will's execution and make sure your gifts reach the right charities more quickly.

The correct organizational names, addresses and tax I.D. number are as follows:

A Rocha USA, Inc.
P.O. Box 1338
Fredericksburg, TX 78624
tax I.D.#31-1751509

For more information, please contact:

Tom Rowley, Executive Director
A Rocha USA
PO Box 1338
Fredericksburg, TX 786214

(830) 992-7941 / tom.rowley@arocha.org

All inquiries treated in confidence.

This information is intended only as a general introduction to bequests as a form of legacy giving.
Please consult qualified legal counsel in preparing your estate plans.