



Sample wording for bequest to the Public Library for Union County

If you have decided to leave a gift to the Public Library for Union County in your will, here is some wording which may help. The Public Library for Union County's legal title is 'The Public Library for Union County,' and a bequest may be expressed as outlined in the sample language below:

Special Bequest – to donate a specific amount of money or a specific asset

"I give and bequeath the sum of \$..... (or transfer assets with an equal value) to The Public Library for Union County in Lewisburg, Pennsylvania for the general purpose of supporting the library and its greatest needs."

"I give to The Public Library for Union County in Lewisburg, Pennsylvania all of my shares of [Company Name] to be used for the general purposes of said charity."

Contingent Bequest – to donate a gift if certain conditions are met

"I give and bequeath the sum of \$.....or.....% of my estate (or transfer assets with an equal value to The Public Library for Union County in Lewisburg, Pennsylvania for the general purpose of supporting the library and its greatest needs if [condition is met]..."

"In the event that _____, I give The Public Library for Union County _____ to be used for the general purpose of said charity." [e.g. my sister does not survive me]

Residual Bequest – to donate an identified percentage/portion of what is left in your estate after taxes, debts, and other bequests are paid

"I give and bequeath the sum of % of the residue of my estate (or transfer assets with an equal value) to The Public Library for Union County in Lewisburg, Pennsylvania for the general purpose of supporting the library and its greatest needs."

"I give ___% of the rest, residue, and remained of my estate to The Public Library for Union County for its general purposes."

Note: Rather than "for the general purposes," the language may also state "for such purposes as the Board of Trustees of said charity may from time to time determine."

Bequests for restricted purposes

If you have decided to leave a legacy to The Public Library for Union County with a restricted purpose, use the above language but also describe the particular purpose, for example:

"...to be used for the Children's Library," or "...to be invested in The Public Library for Union County's Endowment Fund."

If you would like to restrict bequest funds, it is recommended that you include language that allows The Public Library for Union County to use the gift for a different purpose if circumstances change, in order to ensure your gift will still go towards the organization in a meaningful way. We recommend including the following clause to your will if you are in full agreement with the intention expressed:

"In the event that, in the opinion of the Board of Trustees of The Public Library for Union County, it should become impossible, inadvisable, or impractical to apply this gift for said purpose, the gift may be used for other purpose consonant with the spirit and intention of this gift, adhering as closely as possible to my stated intention."

"In the event that unforeseen circumstances make the specified use of the bequest no longer practical or desirable, The Public Library for Union County is hereby authorized to make changes in its use while keeping as close as possible to the spirit and general intent of the bequest."

Note: These clauses are provided to aid in your estate planning process. Please review them with your own legal and tax advisors to determine their suitability for your unique personal, financial and tax situation. They are offered as an aid to assist in your planning, with an understanding that The Public Library for Union County is not providing legal or professional advice.

Charitable Information

Legal Name: The Public Library for Union County

EIN Number: 23-2208061

Primary Address: The Public Library for Union County
255 Reitz Boulevard
Lewisburg, PA 17842

Contact Us

For assistance, contact: Roberta Greene, Director
The Public Library for Union County
570-523-1172
rgreene@publibuc.org