

Legacy Strategy – Trust and Estate Examples (Internal)

Example 1

“...V. Distributions

I designate the following specific distributions:

\$5,000.00 to Youth for Christ Southwest Michigan, a 501(c)3 located in Sturgis, Michigan, for purposes desired by its board of trustees

I devise the residue to my children, as follows:

*Jane R. Doe
John Q. Doe...”*

Example 2

“...III. Distributions

I designate the following distributions from my trust assets:

*40% to Youth for Christ Southwest Michigan, a 501(c)3 located in Sturgis, Michigan, for purposes desired by its board of trustees
20% to my daughter, Jane R. Doe
20% to my daughter, Jenny S. Doe
20% to my son, John Q. Doe*

For any one of my children who predeceases me, his or her share will revert to Youth for Christ Southwest Michigan, for purposes desired by its board of trustees...”

Example 3

“...VI. Distributions

I designate that my estate be distributed in equal shares to my living children pro rata. If all my children predecease me, my estate must be distributed to Youth for Christ Southwest Michigan, a 501(c)3 located in Sturgis, Michigan, for purposes desired by its board of trustees...”