



## Sample Bequest Language

Rev. 3/30/17

Donors are encouraged to remember Children's Mercy in their estate plans. Bequests in wills and trusts may be directed to either The Children's Mercy Hospital Foundation or The Children's Mercy Hospital. Planned gifts to the Foundation are typically used to create a named and/or restricted endowment or to support the unrestricted endowment. Gifts to the Hospital are typically used to support the current needs of Children's Mercy.

The legal name of the Foundation is: ***The Children's Mercy Hospital Foundation***  
2401 Gillham Road, Kansas City, MO 64108  
EIN# 43-1564302

The legal name of the Hospital is: ***The Children's Mercy Hospital***  
2401 Gillham Road, Kansas City, MO 64108  
EIN# 44-0605373

### **Step 1: Describe the Gift:**

*"To The Children's Mercy Hospital Foundation (or "The Children's Mercy Hospital")..."*

- *"the sum of \$ \_\_\_\_\_," or*
- *" \_\_\_\_\_ % of my estate owned by me at my death," or*
- *" \_\_\_\_\_ % of the residue of my estate," or*
- *"the following described property: \_\_\_\_\_."*

### **Step 2: Describe the Purpose:**

- *"for the unrestricted use and benefit of Children's Mercy Hospital," or*
- *"to support \_\_\_\_\_ (name of program or department) at Children's Mercy Hospital," or*
- *"to establish the \_\_\_\_\_ (Named) Endowment, the distribution of which is to be used "to support \_\_\_\_\_ (program or department) at Children's Mercy Hospital," or*
- *"to fund the previously established \_\_\_\_\_ (Named) Endowment at Children's Mercy Hospital Foundation (or Children's Mercy Hospital)."*

### **Step 3: Include Language for a Restricted Gift (Optional):**

The Children's Mercy Hospital Foundation and The Children's Mercy Hospital suggest that a restricted (or designated) bequest be made in the broadest terms possible consistent with a donor's interests. This will provide a safeguard against if a planned gift

provision becomes obsolete, impractical, or unusable in the future (i.e. to support research for a disease for which a cure is later discovered).

The Boards of Directors of the Foundation and Hospital may elect to utilize a bequest received in the future for comparable or related purposes if the bequest is restricted (designated) for a purpose that becomes obsolete, impractical, or unusable in the future. Please include the following language in the bequest provision:

- *“...provided, however, that the Board of Directors of Children’s Mercy Hospital Foundation (or The Children’s Mercy Hospital), is authorized to make use of the principal and income for other purposes of the Foundation or Hospital should the restricted use of the bequest cease to exist. The principal and income of this gift may be co-mingled with other assets of the Foundation for investment purposes. This gift may bear its proportionate share of expenses allocated by the Directors against invested assets of the Foundation.*

Beneficiary designations for **Life Insurance Policies** or **Retirement Plans** may also include The Children’s Mercy Hospital Foundation or The Children’s Mercy Hospital. Please designate a dollar amount or percentage of the policy or plan and include the appropriate EIN# on the beneficiary designation form to be filed with the life insurance company.

With bequests and beneficiary designations, we are pleased to create and maintain a separate gift agreement for restricted (designated) gifts and/or gifts to be held in endowment to ensure that Children’s Mercy has your complete instructions and preferences.

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We are very pleased to acknowledge you as a member of the **Children’s Mercy Legacy Honor Roll**, which recognizes individuals who have remembered Children’s Mercy in their estate plan or other planned gift arrangement.

For more information, please contact your gift officer or Phil Watson, Managing Director of Philanthropic Gift Planning at 816-701-4339 or [pawatson@cmh.edu](mailto:pawatson@cmh.edu). Additional gift planning resources may also be found at <http://giftplanning.childrensmercy.org>.