



# FELICIAN SISTERS OF NORTH AMERICA

871 Mercer Road | Beaver Falls, PA 15010-6815 | [www.feliciansistersna.org](http://www.feliciansistersna.org) | 724-384-5303

## Planning Your Legacy: Bequest Information and Suggested Language

Thank you for your interest in supporting the Felician Sisters of North America (FSNA) through a bequest. There are several ways you can make a bequest to the FSNA. The following information may be helpful in preparing your estate documents. The material is provided for informational purposes only, and does not constitute legal, financial, or estate-planning advice. You should consult your personal attorney and/or tax adviser for specific guidance about your options.

### Beneficiary Designation

When naming the Felician Sisters of North America as a beneficiary of your will, retirement plan, IRA, life insurance, securities/brokerage account or bank account, we recommend including the following information:

- **The Felician Sisters of North America, 871 Mercer Road, Beaver Falls, PA 15010-6815**
- **Federal Tax ID Number: 27-1282473**

### Bequest Types and Language

**Specific:** Making a gift of a specific asset such as real estate, a car, other property or a gift for a specific dollar amount. For example, you may wish to leave your home or \$10,000 to the Felician Sisters of North America.

I give, devise and bequeath [identify here a specific sum of money or a specific asset, include the address if real estate or a description if it is an item] to The Felician Sisters of North America, 871 Mercer Road, Beaver Falls, PA 15010-6815, to be used for the exclusive benefit of the Felician Sisters of North America in such a manner as the Provincial Council of Our Lady of Hope Province thereof may direct.

**Percentage:** Leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 10% of your estate to the FSNA.

I give, devise and bequeath [identify here a specific % of your total estate] to The Felician Sisters of North America, 871 Mercer Road, Beaver Falls, PA 15010-6815, to be used for the exclusive benefit of the Felician Sisters of North America in such a manner as the Provincial Council of Our Lady of Hope Province thereof may direct.

**Residuary:** Leaving the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 30% of the residue of your estate to the FSNA.

I give, devise and bequeath all [or a portion, for example, 50%] of the rest, residue and remainder of my estate to the Felician Sisters of North America, 871 Mercer Road, Beaver Falls, PA 15010-6815, to be used for the exclusive benefit of the Felician Sisters of North America in such a manner as the Provincial Council of Our Lady of Hope Province thereof may direct.

**Contingent:** Leaving a gift to charity only if the purpose of the primary bequest cannot be met. For example, you could leave specific property, to a relative, but the bequest language could provide that if the relative is not alive at the time of your death, the vacation home will go to the FSNA.

In the event that [insert name of primary beneficiary] shall not survive me, or shall die ninety (90) days from the date of my death, then I give, devise and bequeath [identify a specific sum of money, asset or the portion of the residual estate that would have been given to the primary beneficiary] Felician Sisters of North America, 871 Mercer Road, Beaver Falls, PA 15010-6815, to be used for the exclusive benefit of the Felician Sisters of North America in such a manner as the Provincial Council of Our Lady of Hope Province thereof may direct.

## Restricted Bequest

If you are considering a bequest but would like to ensure that your bequest will be used only for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give that will ensure your charitable objectives can be met. We will also work with you and your attorney to craft language to accomplish your objectives.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give the Felician Sisters of North America flexibility should it no longer be possible to use your gift as you originally intended.

If it is determined by the Provincial Council of Our Lady of Hope Province that all or part of the gift is no longer needed, or for any reason cannot be used for the stated purpose, then such portion of the gift may be used for other related purposes, which the Provincial Council deems to be in the best interests of the Felician Sisters of North America, giving consideration to the original purposes described above.

## Contact Us

Please contact us if you have any questions about how to make a bequest to the Felician Sisters of North America or to request any additional information that might be helpful to you and your attorney as you consider making a bequest to us. **For more information please contact Marcia Wallander, Director of Development, at 724-384-5303 or [mwallander@feliciansisters.org](mailto:mwallander@feliciansisters.org).**



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## CHARITABLE STATEMENT OF INTENT

Please complete the following information if you wish to inform the Felician Sisters of North America of your estate gift. The Felician Sisters of North America relies upon this document in our efforts to ensure that your wishes are honored. It is non-binding and may be updated at any time should your intentions change. Thank you for including us in your legacy planning!

### DONOR INFORMATION

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_  Sister  Father  Miss  Mrs.  Mr.  Dr.  \_\_\_\_\_

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

### GIFT TYPE

I intend to make a gift to the Felician Sisters of North America through my:  
(Please include the estimated current monetary value of your gift.)

**Will:** \$ \_\_\_\_\_ or \_\_\_\_\_ percent of my estate

**Life Insurance Policy:** \$ \_\_\_\_\_  **Retirement Plan/IRA:** \$ \_\_\_\_\_

**Life Income Plan:** \$ \_\_\_\_\_  **Other Assets:** \_\_\_\_\_

### GIFT DESIGNATION

Please use my planned gift to support the Felician Sisters of North America's greatest needs.

Please use my planned gift to support the following: \_\_\_\_\_

### RECOGNITION

\_\_\_\_\_

*Name(s) as you would like to be listed in our donor publication.*

I prefer to remain **anonymous**. Please do not include my name in FSNA publications.

Thank you for your belief and support of the Felician Sisters of North America. Your generosity will have a significant, positive impact helping us to live our commitment to justice and peace, and to raise the dignity of the human person, especially women and children, in the whole world.

**The Felician Sisters of North America** IS A 501(c)(3) TAX-EXEMPT ORGANIZATION. CONTRIBUTIONS ARE TAX DEDUCTIBLE TO THE EXTENT PERMITTED BY LAW.