



How to include Unbound in your will or trust

There are several ways to include Unbound as part of your overall estate plan. Many of our sponsors and donors have requested sample language to be included as a bequest in their will or trust. If you already have a will, it may be easier to add a codicil naming Unbound as a beneficiary. Codicils are simple addendums that allow you to alter a provision of your will without rewriting the entire document.

Included below is sample language to address the general needs of the organization or to provide for the ongoing benefits of your sponsored friend. This suggested language may be easily modified to meet the specific objectives of your estate plan. We recommend that you periodically review the provisions outlined in your will or trust to ensure that they fully represent your personal and financial needs, and are consistent with the intended use of assets accumulated during your lifetime.

Sample bequest language for the general purposes of the organization:

“I hereby give, devise and bequeath to Unbound, fully incorporated under the laws of the State of Missouri (Federal tax identification number 43-124399) the sum of \$ _____ or _____% from my residuary estate. I direct this gift to be used for the general purposes of the organization where the need is greatest.”

Sample bequest language for continuation of sponsorship benefits and funding for emergency assistance and higher education:

“I hereby give, devise and bequeath to Unbound, fully incorporated under the laws of the State of Missouri (Federal tax identification number 43-124399), the sum of \$ _____ or _____% from my residuary estate for the benefit of my sponsored friend, (name of child or aging person) (CH number) of (country), for the continuation of his/her sponsorship benefits and to provide funding as needed for emergency assistance, higher education or vocational training. If my sponsored friend has left the program or has no assessed need for continued assistance, any residual funds may be used for others sponsored by me, or applied to the scholarship fund or general fund at the discretion of CFCA.”

Should you choose to include Unbound in your estate plan, please notify us by mail at giftplanning@unbound.org, or by phone at 800.875.6564 or 913.384.6500. Your courtesy notification will allow us to express our gratitude and update our files with the intended use of your gift.

This document provides general information about gift planning and is not intended to provide individual financial, legal or tax information or advice. Unbound recommends that you speak with a tax adviser, financial adviser or attorney about how to make charitable giving part of your overall financial plan.