



## CHARITABLE BEQUESTS AT HOMEWARDBOUND

The following language provides some suggested wording for remembering HomewardBound in your will.

**SPECIFIC MONETARY BEQUEST:** I give to HomewardBound of the Grand Valley in Grand Junction, Colorado, a nonprofit charitable organization, for charitable purposes, \$\_\_ (a flat amount or percentage of my estate)

**SPECIFIC PROPERTY BEQUEST:** I give the following described property to HomewardBound of the Grand Valley in Grand Junction, Colorado, a nonprofit charitable organization.

**RESIDUARY BEQUEST:** I give all (or a percentage) of the remainder of my estate to HomewardBound of the Grand Valley in Grand Junction, Colorado, a nonprofit charitable organization.

**CONTINGENT BEQUEST:** In the event (primary beneficiary) does not survive me, I give said amount to HomewardBound of the Grand Valley in Grand Junction, Colorado, a nonprofit charitable organization.

If you choose to direct a bequest to HomewardBound of the Grand Valley, we encourage you to share your plans with us. They will remain confidential and will ensure that when the time comes, HomewardBound understands and honors your intentions.

## DESIGNATION

**RESTRICTED BEQUEST:** Donors are allowed to specify how the funds should be used. For example, you may wish to designate your bequest for meals, programming, or operation needs. Please contact us to ensure your goals can be honored.

**MEMORIAL BEQUEST:** A gift that pays tribute to or memorializes a person. We are pleased to honor your request and have many ways to grant appropriate recognition.

An example: "I give (amount or description of asset) to HomewardBound of the Grand Valley in Grand Junction, Colorado, a nonprofit charitable organization, for the purpose of (or in memorial of) \_\_\_\_\_"

## BEQUEST INTENTION LETTER

Dear HomewardBound of the Grand Valley:

It is our/my honor to inform your organization that we have named HomewardBound of the Grand Valley as a beneficiary of an estate gift. This letter indicates our/my intention to make a bequest to your organization through our/my estate plan. The donation of \_\_\_\_\_ (*amount, description of asset, percentage of estate, remainder*) to be used to support the operations and further the quality of life for the guests and individuals accessing services with HomewardBound of the Grand Valley.

Understanding that this gift intention may change, I/we will inform you should our intent to donate to HomewardBound or if the dollar value of the bequest intention significantly changes.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Please Return to:  
HomewardBound of the Grand Valley  
562 29 Road  
Grand Junction, CO 81504

Thank you for sharing your intentions to donate from your estate. With this information we can ensure that when the time comes, HomewardBound of the Grand Valley can abide by your bequest intentions. Your plans are confidential. This letter serves as an acknowledgement, you will need to designate your bequest in your will and estate planning documents. As with any financial decision, we recommend seeking advice from your financial advisor to include the language that best suits your needs.