



## Bequest Intention Form

### CONFIDENTIAL

Please use this form to share the details of your bequest intentions with Berkshire Museum. In recognition of your disclosure, we will be honored to invite you to join our Legacy Society, a select group of donors who have created a future gift intention to support Berkshire Museum.

My/our estate plan designates Trustees of the Berkshire Museum as follows:

☐ There is a bequest in my/our will or trust to benefit Berkshire Museum

☐ A specific dollar amount: \$ \_\_\_\_\_

☐ A percentage of my/our estate: \_\_\_\_\_ %

☐ The residual of my/our estate

☐ Enclosed is a copy of the relevant provision in my/our will (Optional)

☐ Berkshire Museum is a/the beneficiary of my IRA or other retirement plan and/or

☐ Berkshire Museum is the beneficiary of:

☐ A Charitable Remainder Trust

☐ A Life Insurance Policy

☐ A Financial or Investment Account

Currently, I estimate that this may result in a gift of: \$ \_\_\_\_\_

☐ I/We hereby give permission to Berkshire Museum to use my/our name/Fund in its publications.

☐ I/We hereby choose to have my/our name(s) remain anonymous.

☐ I/We hereby give permission to Berkshire Museum to use my/our name/Fund in its publications after my/our lifetime.

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_ Date of Birth (Optional): \_\_\_\_\_

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_ Date of Birth (Optional): \_\_\_\_\_

For questions regarding your planned gift, please contact William Demick, Membership and Development Manager, (413) 443-7171 ext. 382, [wdemick@berkshitemuseum.org](mailto:wdemick@berkshitemuseum.org).

*Berkshire Museum is a 501(c)(3) not-for-profit organization, Federal Tax Id #04-2103878.*



## BERKSHIRE MUSEUM

### Contact Information

#### Donor(s)

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

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

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

Home Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

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

#### Attorney

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

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

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

Work Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

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

#### Financial Advisor

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

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

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

Work Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

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

### Sample Bequest Language

The following provides typical language to include a charitable bequest in your will. Please consult with your attorney.

1. **Percentage:** "I give to Trustees of the Berkshire Museum, a nonprofit organization of the state of MA, located at 39 South Street, Pittsfield, MA 01201, \_\_\_\_\_% of my estate."
2. **Specific:** "I give to Trustees of the Berkshire Museum, a nonprofit organization of the state of MA, located at 39 South Street, Pittsfield, MA 01201,"  
(Choose one or more that apply):
  - a. The sum of \$ \_\_\_\_\_
  - b. \_\_\_\_\_ shares of stock in \_\_\_\_\_ Company
  - c. My real property commonly known as \_\_\_\_\_
3. **Residual:** "I give to Trustees of the Berkshire Museum, a nonprofit organization of the state of MA, located at 39 South Street, Pittsfield, MA 01201, all the residua of my estate, including real personal property."
4. **Contingent:** "In the event of the death of any of the beneficiaries, I give to Trustees of the Berkshire Museum, a nonprofit organization of the state of MA, located at 39 South Street, Pittsfield, MA 01201, \_\_\_\_\_ (a percentage, specific, or residual language as above)."