

## New England Deaconess Association Legacy Society

### Making a Bequest to New England Deaconess Association

A bequest is a time honored way to provide significant help for causes that touch your heart and for which you wish to leave a legacy of support. We hope that the New England Deaconess Association (NEDA) is one of the causes you hold near to your heart and choose to support in this meaningful way. Supporters who make us aware of their intent to leave a bequest to NEDA in their will become members of our Legacy Society, a very special group of people who know of our heritage and wish to be a part of ensuring our future. Your Legacy Society membership can be confidential or we would be happy to recognize you as a Legacy Society member through publications like our annual report.

With a gift through your will you retain full use of your gift during your life. There are several types of bequests that can be made to NEDA and the two simplest forms are described below.

A gift to NEDA may be ***restricted or unrestricted***. An unrestricted gift allows the Board of Directors of NEDA to use the gift at its discretion in response to the organization's needs, and is particularly valuable because needs will change from the time the will is made to the time the bequest is actually received.

- To make an *Unrestricted Bequest*, the language might read:

“I bequeath \_\_\_\_\_ (describe dollar amount, percentage of your residuary estate or other property\*) to the New England Deaconess Association, a not-for-profit corporation located at 80 Deaconess Road, Concord, Massachusetts, 01742 for its general charitable purposes.”

(\*Please note that when giving specific property such as land, a residence, etc. please consult first with the Development Office at New England Deaconess Association regarding the specific wording necessary.)

- Making a *Restricted Bequest*

However, supporters of NEDA may wish to support special programs or needs of the organization, or a specific part of the organization. Such a gift may be ***restricted*** by stating clearly in the will how the bequest is to be used. Suggested wording for a restricted bequest:

“I give, devise and bequeath to New England Deaconess Association, a Massachusetts charitable organization, located at 80 Deaconess Road, Concord, Massachusetts, the sum of \$\_\_\_\_\_ to be used for (specific purpose).”

Restricted gifts may be made in any dollar amount or as a percentage of your residuary estate, or through other property. (Please note that when giving specific property such as land, a residence, etc. please consult first with the Development Office at New England Deaconess Association regarding the specific wording necessary.)

Donors making restricted gifts to NEDA should do so with the safeguard of a *contingent clause* to allow the organization, if necessary, to direct the gift to the area of greatest need if the original purpose no longer exists. Suggested wording for a *contingent clause* is: “If, at some future time, in the judgement of the majority of the Board of Directors of New England Deaconess Association, this gift can no longer be used to the best advantage for the purposes or in the manner specified, then it may be used for such related purposes and in such other manner as the board may deem appropriate.” (For example, a bequest written in the early 1900’s that stated that the funds should be used for the purchase of horse and buggy teams could be utilized to purchase cars after their invention if a contingent clause existed.)

Your will can easily be amended through a simple legal device known as a “codicil.” Quite simply, a codicil is a clearly worded paragraph that can be added to your will, thereby amending its provisions. A codicil must be executed, signed and witnessed in accordance with the laws of your state, but it provides an easy vehicle for your legal professional to include New England Deaconess Association as a beneficiary of your estate.

We hope you will find this information helpful and will choose to show your support of NEDA through a bequest in your will. (We have information about other types of bequest arrangements if you would like to discuss them.)

If you have made a bequest to NEDA and we do not know it, or if you wish to state your intent, we would like to hear from you. Please contact Ms. Phyllis Bailey, Director of Development for NEDA, at 978-369-5151 x370, or at [pbailey@nedeaconess.com](mailto:pbailey@nedeaconess.com) or return the form attached.

**\*\*\*\*Note** that bequests should still be written to **New England Deaconess Association**, which will continue to be our legal name, though we are re-branding as “Deaconess Abundant Life Communities” to reflect the change in how we deliver our services.

