



WHERE THERE IS A WILL...

By Fay Blix, Esq.

One of the easiest ways to have a lasting impact on Alzheimer's Family Services Center's future is to leave a gift in our wills or trusts. This gift is sometimes called a "bequest." "Bequest" is derived from the Old English "bec wethan," meaning "to declare" or "express in words." A "behest." It is a calling into being, a variation of, "Speak, and it is done." A will, therefore, is a legal declaration that "speaks" as to how one's property will be transferred at death.

Charitable gifts made by will or trust are one hundred percent (100%) tax deductible. They can be designated for a specific purpose or be completely unrestricted, giving Alzheimer's Family Services Center the most flexibility. Such gifts can be a specific item, a specific amount, a percentage of a specific item, a percentage of the entire estate, or based on a contingency. They also can be made in honor of someone still alive or in memory of someone who is very special to you.

Perhaps the following examples will trigger some ideas for you as you plan your future:

Specific Item

"I give, devise and bequest all my shares of Disneyland stock and my Hummel collection to Alzheimer's Family Services Center, to be used for the benefit of Alzheimer's Family Services Center in such manner as its Board of Directors may direct."

Specific Amount

"I give, devise and bequest the sum of ten thousand dollars (\$10,000) to Alzheimer's Family Services Center..."

Percentage of a Specific Item

"I give, devise and bequest ten percent (10%) of the proceeds from the sale of my family residence, located at 1235 La La Lane, Huntington Beach, California to Alzheimer's Family Services Center..."

Percentage of Entire Estate

"I give, devise and bequest ten percent (10%) of the rest, residue and remainder of my estate, wheresoever located, to Alzheimer's Family Services Center..."

Contingency Gift

"I give, devise and bequest ten percent (10%) of the rest, residue and remainder of my estate, wheresoever located, to my brother, Joe Jones, if he survives me. If not, then to Alzheimer's Family Services Center..."

Restricted Gift

"I give, devise and bequest the sum of ten thousand dollars (\$10,000) to Alzheimer's Family Services Center to be used for the next annual gala, "A Gathering of Friends..."

Honor Gift

"I give, devise and bequest ten percent (10%) of the rest, residue and remainder of my estate to Alzheimer's Family Services Center in honor of Dr. Gwyn Perry in gratitude for all he has contributed to the community health of Orange County."

Memory Gift

"I give, devise and bequest ten percent (10%) of the rest, residue and remainder of my estate to Alzheimer's Family Services Center in memory of my mother, Grace Blix, as a fitting tribute for all she taught me about Alzheimer's Disease..."

Or

"I give, devise and bequest ten percent (10%) of the rest, residue and remainder of my estate to Alzheimer's Family Services Center in memory of my mother, Mary Jones, in appreciation for the wonderful care Alzheimer's Family Services Center provided her during her lifetime."

You can be as creative as you wish to be in designing your own special gift to Alzheimer's Family Services Center in your own estate plan. It is your way of expressing a lasting commitment to a cause that has meaning to you, your way of teaching your family some of your most precious values. Yet it costs you nothing during your lifetime.

Alzheimer's Family Services Center welcomes the opportunity to work with you and your attorney in finding tax-wise ways to support our mission. Can you imagine what a difference it would make to our future if everyone reading this newsletter left even a "little" gift? That is my dream...

**About the Writer**

Fay Blix, a certified elder law attorney by the National Elder Law Foundation, operates her own Elder Law Center in Laguna Hills, CA and has been an AFSC dedicated board member for 4 years. Fay has been specializing in elder law since 1989 and has been working with community senior organizations from the beginning. She is fiercely committed to helping others and has been recognized for her efforts by the Alzheimer's Association with the Maureen Reagan Outstanding Advocate Award.