



*For people with intellectual
and developmental disabilities*

The Arc of Massachusetts
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Waltham, MA 02453-2710

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Achieve with us.

Making a Bequest to The Arc of Massachusetts

One way for you to support the mission of The Arc of Massachusetts and to leave a lasting legacy is through a bequest. A bequest is a gift made to charity in your will or trust. A significant benefit of making a gift by bequest is that it allows you to continue to use the assets/property you may leave to charity during your life. Your gift can be for a specific amount, a percentage or some portion of the remainder (after family, relatives and friends have received their designated share). Below are examples of language you can use.

Please do let us know if you have included The Arc of Massachusetts in your will or estate plans. We would very much like to thank you for your foresight and generosity and make you a member of the *Advocates for the Future* society!

Types of Bequests

There are a number of ways you can make a bequest to The Arc of Massachusetts. A ***specific bequest*** involves making a gift of a defined dollar amount, a particular tangible asset such as real estate, a car, shares of stock, or other property. For example, you may wish to bequeath a retirement account, a portion of your home's value, or \$10,000 to The Arc of Massachusetts. Another kind of specific bequest involves leaving a percentage of your overall estate to charity. For example, you may wish to leave 15% of your estate to The Arc of Massachusetts.

A ***residual bequest*** is made from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 30% of the remaining value of your estate to The Arc of Massachusetts.

Bequest Benefits

There are no limitations on bequest gifts. Bequests may be made for a general or specific purpose. As of 2017, all bequests to tax-exempt entities approved by the IRS are not subject to estate taxes. Please be sure to consult your tax advisor for advice regarding your own personal situation. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes resulting in a larger inheritance for your heirs.

Bequest Language

Your attorney can help you include a bequest to The Arc of Massachusetts in your estate plan. We have provided some basic bequest language to assist you and your attorney. Please use our permanent mailing address and tax ID number in your will:

The Arc of Massachusetts
217 South Street
Waltham, MA 02453
Federal Tax ID #04-2223502

Sample Bequest Language

If you consider making an outright bequest to The Arc of Massachusetts, we recommend the following language:

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath (DOLLAR AMOUNT) to The Arc of Massachusetts, a non-profit organization located at 217 South Street in Waltham, Massachusetts 02453 (Federal Tax ID #04-2223502), for The Arc of Massachusetts general use and purpose.

Bequest of Specific Personal Property

I hereby give, devise and bequeath (DESCRIPTION OF PROPERTY) to The Arc of Massachusetts, a non-profit organization located at 217 South Street in Waltham, Massachusetts 02453 (Federal Tax ID #04-2223502), for The Arc of Massachusetts general use and purpose.

Bequest of Specific Real Estate

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at (ADDRESS OR DESCRIPTION OF PROPERTY) to The Arc of Massachusetts, a non-profit organization located at 217 South Street in Waltham, Massachusetts 02453 (Federal Tax ID #04-2223502), for The Arc of Massachusetts general use and purpose.

Bequest of Percentage of an Estate

I hereby give, devise and bequeath (PERCENTAGE OF YOUR ESTATE) to The Arc of Massachusetts, a non-profit organization located at 217 South Street in Waltham, Massachusetts 02453 (Federal Tax ID #04-2223502), for The Arc of Massachusetts general use and purpose.

Bequest Restricted to a Specific Program or Purpose

If you are considering a bequest, but would like it to be used only for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give that will ensure your charitable objectives can be met. We will also work with you and your attorney to craft language to accomplish your objectives.

Please contact Katrin Aback, Director of Development, if you have any questions about how to make a bequest to The Arc of Massachusetts. She can be reached at aback@arcmass.org or 781-891-6270 x105.

The information contained here is provided for informational purposes only and should not be construed as legal or financial advice on any matter. We encourage you to seek the advice of an attorney and/or a financial planner with expertise in special needs planning who can advise you on how to protect both current and future financial needs.