



**Wisconsin Historical
FOUNDATION**

Sample Bequest Language

The Wisconsin Historical Foundation, Inc. is a 501(c)(3) tax-exempt, charitable organization.

Donors who wish to make bequests or beneficiary designations to support the Wisconsin Historical Society should use the following legal name:

Wisconsin Historical Foundation, Inc.

816 State Street, P.O. Box 260050
Madison, WI 53726

Federal Tax ID: 39-0921093

Your attorney may want to include this number in your will or trust to help your executor facilitate your bequest.

Example Bequest Language

The following includes several examples of suggested bequest wording to benefit the Wisconsin Historical Society through Wisconsin Historical Foundation, Inc.

Each individual situation is unique and, therefore, these examples include only some of the possible gift opportunities. We recommend that you consult with your attorney regarding any bequest, trust provision or retirement plan designation. We are available to work with your professional advisors, but the Wisconsin Historical Society does not provide legal or tax advice.

1. WILLS:

A. Percentage of Estate for Unrestricted Purposes: I hereby give, devise and bequeath to Wisconsin Historical Foundation, Inc. (Federal Tax ID: 39-0921093), a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, ___ percent (___%) of the rest, residue and remainder of my estate as an unrestricted gift.

B. Percentage of Estate for Restricted Purposes: I hereby give, devise and bequeath to Wisconsin Historical Foundation, Inc. (Federal Tax ID: 39-0921093), a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, ___ percent (___%) of the rest, residue and remainder of my estate to be used for _____ to benefit the Wisconsin Historical Society. It is understood and agreed that should the purpose for which this bequest is made have ceased to exist, then Wisconsin Historical Foundation, Inc., may devote said bequest for such other uses and purposes as it determines will benefit the said Society.

C. Specific Amount for Unrestricted Purposes: I hereby give, devise and bequeath to Wisconsin Historical Foundation, Inc. (Federal Tax ID: 39-0921093), a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, the sum of _____ dollars (\$____) as an unrestricted gift.

Supporting the Wisconsin Historical Society Since 1954

816 State Street P.O. Box 260050 Madison, Wisconsin 53726-0050 tel. 608.261.9364 fax 608.264.6545

2. **TRUSTS:**

A. Final Distribution: Percentage of Trust for Unrestricted Purposes: I hereby direct my trustee to distribute to Wisconsin Historical Foundation, Inc. (Federal Tax ID: 39-0921093), a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, ___ percent (___%) of the rest, residue and remainder of my trust as an unrestricted gift.

B. Percentage of Trust for Restricted Purposes: I hereby direct my trustee to distribute to Wisconsin Historical Foundation, Inc. (Federal Tax ID: 39-0921093), a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, ___ percent (___%) of the rest, residue and remainder of my trust to be used for _____ to benefit the Wisconsin Historical Society. It is understood and agreed that should the purpose for which this distribution is made have ceased to exist, then Wisconsin Historical Foundation, Inc., may devote said distribution for such other uses and purposes as it determines will benefit the said Society.

C. Specific Amount for Unrestricted Purposes: I hereby direct my trustee to distribute to Wisconsin Historical Foundation, Inc. (Federal Tax ID: 39-0921093), a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, the sum of _____ dollars (\$____) as an unrestricted gift.

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