



Sample Bequest Language for Sisters of St. Benedict of St. Paul's Monastery

(This is not intended to be legal advice. Please consult an attorney for advice regarding your estate plan.)

1. Specific & Direct Bequest

a. Unrestricted

- i. This type of clause states an amount, percentage, or specific piece of property for the unrestricted use by St. Paul's Monastery.

I, _____, of _____, give, devise and bequeath to St. Paul's Monastery, Sisters of St. Benedict,

For the unrestricted use and purposes of St. Paul's Monastery as determined by the SPM Council in accordance with the recommendation of the Communities Finance Council.

b. Restricted

- i. This type of clause states an amount, percentage, or specific piece of property for use by St. Paul's Monastery for a restricted purpose specified by the benefactor.

I, _____, of _____, give, devise and bequeath to St.

Paul's Monastery, _____
For the following use and purposes of St. Paul's Monastery

If, in the future, St. Paul's Monastery's Prioress, in accordance with the recommendation of the Community Finance Council, determines that the original objectives of the bequest are incapable of being fulfilled, then the Prioress and Community Finance Council may designate other purposes and uses of the bequest (or the income from the bequest) which may relate to the original purpose of the above bequest.

2. Residuary Bequest

- a. This type of bequest gives all or a specified portion of assets remaining in the estate after debts, taxes, expenses and other bequests have been served. It may be unrestricted or restricted.

All the rest, residue and remainder of my estate, both real and personal, of every kind and description, wherever situated and whether now owned or hereafter acquired, including any property with respect to which I may have a power of appointment, I give, devise and bequeath to St. Paul's Monastery.

3. Contingent Bequest

- a. This type of bequest takes effect if something unexpected happens. It ensures that St. Paul's Monastery receives the bequest instead of unintended beneficiaries. These are usually unrestricted, but may also be restricted.

In case of a failure or lapse of any legacy or devise herein, such that the property so bequeathed would pass by intestacy, I/we, _____, of _____, direct that, in lieu thereof, such property shall pass to St. Paul's Monastery.