

Maine Cancer Foundation

Estate Provision Information

Sample Bequest Provisions:

Percentage of Residuary

“I give to Maine Cancer Foundation of Falmouth, Maine, or any institution succeeding to its interests, whether by merger, consolidation or acquisition of assets, to be used [for its general purposes] [for a specific program, such restriction heretofore accepted by the Foundation] _____% of my residuary estate”

Specific Dollar Amount

“I give to Maine Cancer Foundation of Falmouth, Maine, or any institution succeeding to its interests, whether by merger, consolidation or acquisition of assets, to be used [for its general purposes] [for a specific program, such restriction heretofore accepted by the Foundation] the sum of \$_____”

Specific Assets

“I give to Maine Cancer Foundation of Falmouth, Maine, or any institution succeeding to its interests, whether by merger, consolidation or acquisition of assets, to be used [for its general purposes] [for a specific program, such restriction heretofore accepted by the Foundation] _____(e.g., 500 Shares of xyz stock)

Beneficiary Designation:

You can name Maine Cancer Foundation to receive the proceeds of a life insurance policy or a retirement plan, such as an IRA, 401(k), 403(b) or other pension benefit plan. This can only be accomplished by using the beneficiary designation form available from the insurance company, retirement plan administrator or IRA trustee. Because these assets often carry heavy income and/or estate tax burdens, they are ideal assets to use for charitable gifts. Donors should be careful to name the charity on the designation of beneficiary form to obtain the maximum tax savings and administrative efficiency.

Codicil to a Will:

If you already have a will and wish to make a provision for Maine Cancer Foundation without rewriting your will, you may add such a provision with a codicil. A sample codicil is shown on the reverse side of this page.

Sample Codicil

Whereas I, William Wadsworth Wentworth, of Portland, Cumberland County and State of Maine, on the 14th of July, 2010 made and executed my Last Will and Testament in writing, and;

Whereas, I now desire to make certain changes in my said Last Will and Testament;

Now, therefore, I do hereby make, publish and declare this as a first codicil to my said Last Will and Testament, to be annexed to and taken and allowed as part thereof:

First: I hereby amend Item Fourth of my Last Will and Testament, by which I provide for cash devises to certain charities, by adding thereto a new Section (C), which reads as follows:

(C) Devise to Maine Cancer Foundation. I devise to Maine Cancer Foundation, of Falmouth, Maine, or any institution succeeding to its interests, whether by merger, consolidation or acquisition of assets, to be used for its general purposes, the sum of Ten Thousand Dollars (\$10,000).

Second: I hereby reaffirm and redeclare my said Last Will and Testament in all respects except as hereinabove expressly provided.

In testimony whereof, I William Wadsworth Wentworth, the testator, on this 14th day of December, 2012 being first duly sworn, do hereby declare to the undersigned authority that I sign and execute the one page of this instrument as a first codicil to my said Last Will and Testament and as a redeclaration of my said Last Will and Testament, and that I sign willingly as my free and voluntary act and that I am eighteen years of age or older, of sound mind, and under no constraint or undue influence.

Testator

We, the undersigned witnesses, being first duly sworn, do hereby declare to the undersigned authority that the testator has signed and executed this instrument as a first codicil to his Last Will and Testament and as a redeclaration of his said Last Will and Testament, and that he signed it willingly, and that each of us, in the presence and hearing of the testator, signs this first codicil as witness to the testator’s signing, and that to the best of our knowledge the testator is eighteen years of age or older, of sound mind and under no constraint or undue influence.

Witness

Witness

State of Maine
County of Cumberland

Subscribed sworn to and acknowledged before me by William Wadsworth Wentworth, the testator, and subscribed and sworn to before me by _____ and _____, witnesses, this _____ day of December, 2012

Notary Public