



## SAMPLE LEGACY LANGUAGE

### ***1. Bequest Clause to Endow an Annual Gift to USHMM***

I hereby give, devise and bequeath the sum of \$\_\_\_\_\_ (or \_\_\_% of my residuary estate)\* to the United States Holocaust Memorial Museum, an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington DC 20024-2126 (the “USHMM”), to be used by it in support of its *Fund For The Future*, an unrestricted permanent endowment fund (or its successor fund, if any) (the “*Fund*”), earned income from which is permanently restricted to the *Fund*. Distributions from the *Fund* shall be made based on USHMM’s adopted spending plan for the *Fund*, and such distributions are to be made in support of the *Education and Remembrance Fund*, the annual fund of USHMM (or its successor fund, if any).

### ***2. Bequest Clause for an Outright Gift to USHMM***

I hereby give, devise and bequeath the sum of \$\_\_\_\_\_ (or \_\_\_% of my residuary estate)\* to the United States Holocaust Memorial Museum, an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington DC 20024-2126 (the “USHMM”), to be used by it in support of its *Education and Remembrance Fund*, the annual fund of USHMM (or its successor fund, if any).

### ***3. Bequest Clause to Endow a Restricted Gift to USHMM\*\****

I hereby give, devise and bequeath the sum of \$\_\_\_\_\_ (or \_\_\_% of my residuary estate)\* to the United States Holocaust Memorial Museum, an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington DC 20024-2126 (the “USHMM”), to be used by it in support of its **[insert name of Endowment Fund]**, a permanent endowment fund (or its successor fund, if any) (the “*Fund*”), a component fund of USHMM, earned income from which is permanently restricted to the *Fund*. Distributions from the *Fund* shall be made based on USHMM’s adopted spending plan for the *Fund*, and such distributions are to be made in support of the **[insert description of activities to be supported by the specified Endowment Fund]** at USHMM.

\*A specified asset can also be utilized for any one of these bequests. We urge you to please consult with an attorney (as well as with the Director of Planned Giving at USHMM—see below) when choosing the appropriate bequest clause for your needs, and when drafting your Will.

\*\*Restricted endowment fund bequests should be discussed with USHMM as early as possible in your estate planning process to ensure that the restrictions you are considering are feasible.

Please contact George E. Hellman, Esq., Director of Planned Giving, directly at (202) 314-1748 or by e-mail at [planned\\_giving@ushmm.org](mailto:planned_giving@ushmm.org)

For you and your attorney's information, USHMM's Employer Identification Number is 52-1309391.

The information provided on this web site is not intended to serve as tax or legal advice. Please consult your attorney and/or financial advisor before making a gift. Contributions to the United States Holocaust Memorial Museum are eligible for the maximum income and estate tax charitable deductions available for gifts to the public charity.