



Including Sokol Spirit in Your Will or Trust

What does it mean to bequeath to Sokol Spirit?

A bequest to Sokol Spirit may take one of four forms and may be unrestricted or restricted as to purpose. Language reflecting unrestricted bequests allows Sokol Spirit to determine the best use of the funds at the time that they become available.

Sample language for unrestricted bequests includes:

SPECIFIC BEQUEST: (A specific bequest designates a fixed dollar amount or specific asset(s) to Sokol Spirit.) "I give to Sokol Spirit, 3909 Prairie Avenue, Brookfield, IL 60513, [\$____(dollars)] or [designated asset(s)]."

PERCENTAGE BEQUEST: (A percentage bequest designates a percentage of your estate to Sokol Spirit.) "I give to Sokol Spirit, 3909 Prairie Avenue, Brookfield, IL 60513, _____ % (percent) of my estate."

RESIDUARY BEQUEST: (A residuary bequest designates the remainder of your estate after all expenses have been paid and all specific bequests have been satisfied.) "I give [all] or [_____% (percent)] of the residue of my estate to Sokol Spirit, 3909 Prairie Avenue, Brookfield, IL 60513."

CONTINGENT BEQUEST: (A contingent bequest designates a bequest to Sokol Spirit if other beneficiaries are not alive when your will takes effect.) "I give to _____ (name) the greater of \$_____(dollars) or _____ % (percent) of my estate. In the event that he/she shall predecease me, I direct this sum, or percent, to be paid to Sokol Spirit, 3909 Prairie Avenue, Brookfield, IL 60513."

When a donor wishes the bequest to be utilized for a specific purpose, a restricted bequest is made, such as in the following statement: Restricted Bequest: "I give to Sokol Spirit, 3909 Prairie Avenue, Brookfield, IL 60513, the greater of \$_____(dollars) or _____ % (percent) of my estate for the following purpose: _____."

*****If you have an existing will, you can amend it with a codicil to include Sokol Spirit.***

NOTE: Sokol Spirit's tax identification number is **36-2250163**

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