



## Planned Giving In Your Will or Trust

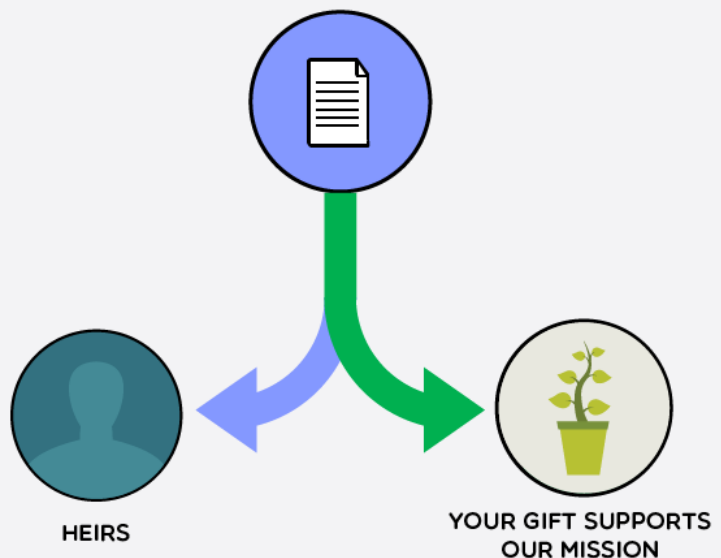
*Plan your legacy by building the future of the Duxbury Rural & Historical Society.*

### HOW TO MAKE A BEQUEST

1. Compose your will or trust.

2. The will or trust distributes assets after your death.

3. Assets transfer to the people and places you choose.



A will represents a person's final wishes and intentions. After providing for your loved ones, please consider one final act of generosity through a bequest in your will or living trust that provides enduring support for our work.

Please contact Executive Director Erin McGough at [emcgough@duxburyhistory.org](mailto:emcgough@duxburyhistory.org) or 781-934-6106 if you would like further information. We are honored to help you secure your legacy.

## **Tools to Make a Bequest:**

If you have not done so, you need to make a will or a living trust instrument. This is a significant and important undertaking. If you have a will or living trust, you may only need to add a codicil to the present will or make an amendment to the present trust.

## **Types of Bequests:**

**Specific Bequest:** You may leave a specific asset or assets, such as real estate, securities or a specific dollar amount.

**Percentage Bequest:** You may leave a specific percentage of your overall estate to the Duxbury Rural & Historical Society.

**Residuary Bequest:** You may gift the remaining balance of the estate after all specified distributions are made and all obligations have been satisfied.

**Contingent Bequest:** A contingent bequest is one that takes effect only if the primary beneficiary or beneficiaries of the bequest are unable to accept the bequest. Usually this means that the primary beneficiary does not survive the benefactor or else disclaims the property. By naming Duxbury Rural & Historical Society as contingent beneficiary, the Duxbury Rural & Historical Society would receive your generous bequest only if the purpose of the primary bequest cannot be met.

Thank you for considering this gift!

*The gift descriptions are for informational purposes and not legal or tax advice. To ensure that this gift fits your particular circumstances and planning, please consult with your professional advisers.*