

Adding a Codicil to an Existing Living Trust or Will to Include a Charitable Bequest

Note - this is an example only. Please consult with your attorney

This is a codicil to my living trust or will dated _____.

I give and bequeath the sum of \$_____

[or] the following described property

[or] _____% of my estate

[or] the residue of my estate

to McLeod Health Foundation. In all other respects I confirm my said living trust or will.

Signed: _____

Witnessed By: _____

Dated: _____

Options for specifying the purpose of the gift:

Where the need is greatest:

Designated for (fund, program, equipment, building, etc.)

Please note, individual financial circumstances will vary. The information on this site does not constitute legal or tax advice. Donor stories and photographs are for purposes of illustration only. As with all tax and estate planning, please consult your attorney or estate specialist.