



Bequest Basics & Sample Bequest Language

In order to make a bequest, please speak with your advisor(s) or attorney to include the Morgridge Institute for Research Foundation in your estate plan. We have provided some sample language to assist you.

1. Specific Bequest

If you are considering making an outright bequest to the Morgridge Institute for Research Foundation, we recommend the following language:

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath \$ _____ to the Morgridge Institute for Research Foundation, Inc., a nonprofit corporation located at 330 North Orchard Street, Madison, WI, 53715, Federal Tax ID #20-8325570, for the Morgridge Institute for Research Foundation's general use and purpose.

If interested in a bequest of specific property or real estate, please contact Bill Swisher at bswisher@morgridge.org or (608) 316-4364.

2. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to the Morgridge Institute for Research Foundation, we recommend the following language:

I hereby give, devise and bequeath _____ percent of my total estate, determined as of the date of my death, to the Morgridge Institute for Research Foundation, Inc., a nonprofit corporation located at 330 North Orchard Street, Madison, WI, 53715, Federal Tax ID #20-8325570, for the Morgridge Institute for Research Foundation's general use and purpose.

3. Residual Bequest

If you are considering making a residual bequest of your estate to the Morgridge Institute for Research Foundation, we recommend the following language:

I hereby give, devise and bequeath to the Morgridge Institute for Research Foundation, Inc., a nonprofit corporation located at 330 North Orchard Street, Madison, WI, 53715, Federal Tax ID #20-8325570, [ALL OR A PERCENTAGE] of the rest, residue and remainder of my estate to be used for the Morgridge Institute for Research Foundation's general use and purpose.



4. Contingent Bequest

If you are considering making a contingent bequest of your estate to the Morgridge Institute for Research Foundation, we recommend the following language:

If [PRIMARY BENEFICIARY] does not survive me, then I hereby give, devise and bequeath to the Morgridge Institute for Research Foundation, Inc., a nonprofit corporation located at 330 North Orchard Street, Madison, WI, 53715, Federal Tax ID #20-8325570, [DESCRIPTION OF PROPERTY] to be used for the Morgridge Institute for Research Foundation's general use and purpose.

5. Restricted Bequests

A restricted bequest is one that identifies a specific intended use for the gift. You may specify one of the program areas of the Morgridge Institute in your bequest, depending on what part of our mission you're most passionate about.

Priority areas for specified giving include:

- Engagement and Outreach Fund
- Fellowship Fund
- Research Fund

If interested in directing your gift to a program or area not listed above, please contact Bill Swisher at bswisher@morgridge.org or (608) 316-4364. Regardless of restricted or general operating support, 100 percent of your gift will go directly to the Morgridge Institute for Research Foundation.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give the Morgridge Institute for Research Foundation flexibility should it no longer be possible for the Morgridge Institute for Research to use your gift as you originally intended:

If, in the judgment of the Board of Trustees at the Morgridge Institute for Research Foundation, Inc., it shall become impossible for the Morgridge Institute for Research Foundation to use this bequest to accomplish the specific purposes of this bequest, the Morgridge Institute for Research Foundation may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.



Contact Information

If you already have included the Morgridge Institute for Research Foundation in your estate plan, we would like to thank you and recognize you for your gift. Please let us know by contacting Bill Swisher or filling out a short form on our website: www.morgridge.org/give

For any questions or concerns, please contact:

Bill Swisher

Phone: (608) 316-4364

Development Office

Email: bswisher@morgridge.org

Morgridge Institute for Research

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