



Including Regis in Your Will General Bequest

Making a planned gift to Regis may also provide a tax deduction for your estate, allow you to manage your assets, and meet your financial needs during your lifetime. A gift from your estate will go directly to the Regis endowment and have a profound impact on the lives of the young men who walk through our doors.

There are many ways to include Regis in your estate plan and qualify your estate for a tax deduction:

- Make a bequest of cash, securities, or other property
- Designate a specific dollar amount, a particular asset, or a fixed percentage of your estate for Regis
- Leave all or a portion of your residuary estate to Regis after you have provided for other beneficiary
- Name Regis as a contingent beneficiary of your estate in the event your other beneficiaries do not survive you

A bequest may be for a percentage of your estate or a specific amount. By designating a percentage of your estate, you can ensure that all beneficiaries, including Regis, receive the proportion you intend if your estate changes in value.

Sample Bequest Language

Here is sample bequest language to review with your attorney:

I hereby give, devise, and bequeath (_____ dollars) or (a specific asset, such as securities, real estate, or other property) or (___ percent of the rest, residue, and remainder of my estate) to Regis High School, a nonprofit organization located at 55 East 84th Street, New York, NY, 10028, Federal Tax ID # 13-1624155, for Regis High School's general use and purpose.

Using a Codicil to Make a Bequest

You may also employ a codicil as a way to add a bequest, and modify your Will without preparing a whole new one. It must be executed with the same conventions as required for the execution of the Will in order to be valid. Those conventions (e.g. witnesses, notary) will vary depending on the state in which you live.