



Suggested Language for Designated Gifts and Named Endowments

A bequest may be undesignated for a general purpose, designated to a specific purpose or established as a named endowment. Below are "purpose" clauses for designated and named endowment gifts that can be added to specific, residual, or contingent bequest language.

Designated Use: Specific Purpose

If you wish to designate your bequest to a specific purpose, we ask that you contact the Pacifica Treatment Centre prior to completing your will, to ensure your gift intentions are consistent with the organization's mission.

"I direct my trustees to deliver, pay or transfer the sum of \$_____ or ___% of the residue of my estate to the Pacifica Treatment Centre to be used for the following purpose(s): (List purposes).

I understand that, if in the opinion of the Board of Directors of the Pacifica Treatment Centre, future circumstances make it impossible, impractical, or inadvisable for the Pacifica Treatment Centre to apply the said gift for the stated purpose(s), the Pacifica Treatment Centre may use the funds or such part thereof in its discretion, in the way it deems most advantageous for the organization, but will adhere as closely as possible to the spirit of the gift and to my original intent.

In any application, the support provided by this bequest shall be clearly identified with the name of _____.

Named Endowment Funds

An endowed fund is a bequest where the gift amount is retained and invested, and the annual income generated supports the Pacifica Treatment Centre programs, services, treatment, and care.

With a bequest of \$50,000 or more, you may establish a named Endowment Fund. Endowed Funds may also be named to honour a loved one.

"I give to the Pacifica Treatment Centre the sum of \$_____ (minimum \$50,000). This gift may be pooled with any of the investment assets of the Pacifica Treatment Centre, but it shall be recognized as the "_____ Endowment Fund". The annual income from the endowment shall be used for general purposes of the Pacifica Treatment Centre at the discretion of the Pacifica Treatment Centre Board of Directors or for the following designated purpose: _____.

I understand that, if in the opinion of the Board of Directors of Casey House Foundation, future circumstances make it impossible, impractical, or inadvisable for the Pacifica Treatment Centre to apply the said gift for the stated purpose(s), the Pacifica Treatment Centre may use the funds or such part thereof in its discretion, in the way it deems most advantageous for the organization, but will adhere as closely as possible to the spirit of the gift and to my original intent.

In any application, the support provided by this bequest shall be clearly identified with the name of _____."



This information and material is intended to provide general examples and reference tools for understating the way in which charitable gifts may be made to the Pacifica Treatment Centre and is for illustration purposes only. The Pacifica Treatment Centre does not give legal or financial advice.

The Pacifica Treatment Centre strongly recommends donors review this information and material and consult with independent legal, financial and/or tax advisors. This will ensure you receive appropriate legal advice, your financial