**Appendix**

**Bequest Language**

Upon consulting with your legal or financial advisor, they can assist you determine how you would like to share your estate with St. Iakovos Retreat Center.

Suggested Charitable Bequest language is below:

***Percentage of Estate:*** “I give, devise and bequest to St. Iakovos Retreat Center, of Kansasville, WI, a tax exempt organization under the 501(c) (3) of the Internal Revenue Code, an amount equal to \_\_\_\_\_\_\_\_\_ percent (\_\_\_\_\_\_\_%) of my adjusted gross estate as finally determined for federal estate tax purposes, to be used for the benefit of the retreat center property, facilities and people served by the St. Iakovos Retreat Center in such a manner as the board of directors thereof may direct the use of.”

***Specific Amount:*** “I give, devise and bequest to St. Iakovos Retreat Center of Kansasville, WI a tax-exempt organization under the 501(c) (3) of the Internal Revenue Code, the sum of $ \_\_\_\_\_\_\_\_\_\_\_\_\_ to be used for the benefit of the retreat center property, facilities and people served by the St. Iakovos Retreat Center in such a manner as the board of directors thereof may direct the use of.”

***Gift of Residuary Estate:*** “I give the rest, residue, and remainder of the property owned by me at death, real and personal wherever situate, to St. Iakovos Retreat Center of Kansasville, WI, a tax exempt organization under the 501(c) (3) of the Internal Revenue Code, to be used for the benefit of the retreat center property, facilities and people served by the St. Iakovos Retreat Center in such a manner as the board of directors thereof may direct the use of.”

***Provision providing for the payment of a pledge(s):***  “I direct my personal representative to pay to St. Iakovos Retreat Center of Kansasville, WI , a tax-exempt organization under the 501(c) (3) of the Internal Revenue Code, as a debit of my estate, any balance which is due, or which will become due under the terms of any documented pledges or promises made by me to the St. Iakovos Retreat Center during my lifetime.”

**Notes:**

The Board of Director of the St. Iakovos Retreat Center reserves the right to reject a bequest that does not advance its mission, policies, programs, religious beliefs, or exempt status.

St. Iakovos Retreat Center shall not act as an executor or personal representative for a donor’s estate.

St. Iakovos Retreat Center Tax Identification Number (FEIN) is: 20-5079909