

Sample Bequest Provisions

Lee Memorial Health System Foundation, Inc. is the primary fund raising entity for Lee Memorial Health System and its related sub-agencies. We are a tax-exempt 501(c)(3) corporation. Our Federal Tax Identification Number is 65-0645343.

Lee Memorial Health System Foundation, Inc. maintains principal offices at 9800 South HealthPark Drive, Suite 210, Fort Myers, Florida 33908. Our telephone number is (239) 985-3550.

You can allow us to apply your gift to meet our most urgent needs through a gift without limits. If you wish to designate your gift for a specific purpose, we ask that you consult us so we can be sure we'll be able to carry out your wishes.

The provision in your will for making a gift to Lee Memorial Health System Foundation, Inc. will depend upon the type of gift and your own circumstances. An attorney should always prepare legal estate planning documents.

These sample provisions may be helpful to your attorney:

Outright Bequest – Specific Amount/Securities/Property

“I give, devise, and bequeath to Lee Memorial Health System Foundation, Inc., a non-profit organization, organized and existing under the laws of the State of Florida, located in Fort Myers, Florida, the sum of **INSERT SPECIFIC AMOUNT**, and/or the securities or other property described herein, namely **INSERT DESCRIPTION OF SECURITIES AND/OR PROPERTY** for its general purposes.”

Outright Bequest – Percentage of Estate

“I give, devise, and bequeath to Lee Memorial Health System Foundation, Inc., a non-profit organization, organized and existing under the laws of the State of Florida, located in Fort Myers, Florida, **INSERT PERCENTAGE** of my estate for its general purposes.”

Bequest of Residuary Estate

“All the rest, residue, and remainder of my estate, both real and personal property of whatever kind and whatsoever situated, which I may own or have the right to dispose of at the time of my decease, I give, devise, and bequeath to Lee Memorial Health System Foundation, Inc., a non-profit organization, organized and existing under the laws of the State of Florida, located in Fort Myers, Florida for its general purposes.”

Bequest of Percentage of Residuary Estate

“All the rest, residue, and remainder of my estate, both real and personal property of whatever kind and wheresoever situated, which I may own or have the right to dispose of at the time of my decease, I give, devise, and bequeath as follows:

- (1) To Lee Memorial Health System Foundation, Inc., a non-profit organization, organized and existing under the laws of the State of Florida, located in Fort Myers, Florida, **INSERT PERCENTAGE** for its general purposes.”

Contingent Bequest

“In the case of the failure or lapse of any legacy or devise herein such that the property so bequeathed or devised would otherwise pass by intestacy (absence of a Will), I give, devise, bequeath any such failed or lapsed legacy or devise to Lee Memorial Health System Foundation, Inc., a non-profit organization, organized and existing under the laws of the State of Florida, located in Fort Myers, Florida, for its general purposes.”