



## Hope Builders Legacy Circle Giving Bequest Language

Donors are encouraged to remember Comprehensive Mental Health Services, Inc. in their estate plans. Bequests in will and trusts may be directed to Comprehensive Mental Health Services, Inc. for the benefit of a named and/or restricted endowment or to support the unrestricted operational, program and facilities/capital needs.

The legal name of the organization is:

Comprehensive Mental Health Services, Inc.  
17844 East 23rd Street, Independence, MO 64057  
Federal Tax ID Number # 43-0949079

Beneficiary designations for Life Insurance Policies or Retirement Plans may also include Comprehensive Mental Health Services, Inc. Please designate a dollar amount or percent of the policy or plan and include our EIN on the beneficiary designation form to be filed with the life insurance company.

With bequests and beneficiary designation, we are pleased to create and maintain a separate gift agreement for restricted (designated gifts and/or gift to be held in endowment to ensure Comprehensive Mental Health Services, Inc. has your complete instructions and preferences).

### Step 1: Describe the Gift:

"To Comprehensive Mental Health Services, Inc.

- "the sum of \$ \_\_\_\_\_," or
- " \_\_\_\_\_ % of my estate owned by me at my death,"
- " \_\_\_\_\_ % of the residue of my estate," or
- "the following described property: \_\_\_\_\_."

### Step 2: Describe the Purpose:

- "for the unrestricted use and benefit of Comprehensive Mental Health Services, Inc." or
- "to support Comprehensive Mental Health Services, Inc."
- "to establish the \_\_\_\_\_ (Named) Endowment, the distribution of which is to be used "to support \_\_\_\_\_ (program or special need) at Comprehensive Mental Health Services, Inc."



### **Hope Builders Legacy Circle Giving Bequest Language Step 3: Include Language for a Restricted Gift (Optional):**

Comprehensive Mental Health Services, Inc. suggests that a restricted (or designated) bequest be made in the broadest terms possible consistent with the donor's interests.

The Board of Directors of Comprehensive Mental Health Services, Inc. may elect to utilize a bequest received in the future for comparable or a related purpose that becomes obsolete or unusable in the future. Please include the following language in the bequest provision:

- "...provided, however, that the Board of Directors of Comprehensive Mental Health Services, Inc. is authorized to make use of the principal and income for other purposes of Comprehensive Mental Health Services, Inc. should the restricted use of the bequest cease to exist. The principal and income of this gift may bear its proportionate share of expenses allocated by the Directors against invested assets of Comprehensive Mental Health Services, Inc.

*The aforementioned information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.*