



The Accokeek Foundation's Frances Bolton Society

Including the Accokeek Foundation in your estate plan

Bequests and other testamentary gifts by generous friends have been a significant source of financial support for the Accokeek Foundation for over 50 years. The continuation and expansion of this tradition will contribute to the Foundation's future financial strength and continued excellence in programs.

A planned gift to the Accokeek Foundation qualifies you as a member of the Frances Bolton Society. The Society was established to thank and recognize those who have remembered the Accokeek Foundation with a planned gift and who, through their example, encourage others to do the same. The Society functions as a leadership circle of friends who share an interest and partnership in the Accokeek Foundation's work. Members meet periodically to socialize and exchange ideas with the Foundation's board, staff, and other prominent stakeholders.

If you have included the Accokeek Foundation in your estate planning, please advise us of your intentions so that we can acknowledge your gift and to offer you membership in the Frances Bolton Society.

Ways to give include: making a specific gift of cash, securities, real estate, or other property through your will, codicil, or trust instrument; designating the Accokeek Foundation as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries; and naming the Accokeek Foundation as a beneficiary of your retirement plan or life insurance policy

Sample testamentary language

I give, devise and bequeath to the Accokeek Foundation, Inc., a Maryland nonstock corporation with the current business address of 3400 Bryan Point Road, Accokeek, MD 20607, the sum of \$_____ for the Foundation's unrestricted use and purpose [or describe specific purpose].

While unrestricted gifts allow the Accokeek Foundation to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific program. To ensure that the needs of future generations are met, it is advisable to include the following language with restricted gifts: *If at any time in the judgment of the Accokeek Foundation, Inc. it is impossible or impracticable to carry out exactly the designated purpose, the Accokeek Foundation, Inc. shall determine an alternative purpose as near as possible to the designated purpose.*

The Accokeek Foundation suggests that all individuals be advised by attorneys in the preparation of their estate plans.

If you wish to document your bequest intention at this time, please complete the form on the back of this sheet.

For more detailed information on including the Accokeek Foundation in your estate plan, please contact:
The Accokeek Foundation, Development Department
3400 Bryan Point Road, Accokeek, MD 20607
Phone 301.283.2113, Fax 301.283.2049
Email development@accokeek.org
Web www.accokeek.org



*The Accokeek Foundation's
Frances Bolton Society*

Documenting your bequest intention

To support the mission of the Accokeek Foundation, I have included a bequest or other planned gift to the Accokeek Foundation.

Check one:

- I have remembered your organization through a bequest in my will or trust or through some other form of planned gift. Please enroll me in the Frances Bolton Legacy Society. You may publish my name.
- I have remembered your organization through a bequest in my will or trust or through some other form of planned gift. Please enroll me in the Frances Bolton Legacy Society. **Do not, however, publish my name.**

Donor Comments (optional)

Name(s) (Please Print)

Street, City, State, Zip

Home Telephone

Business Telephone

Signature(s)

Date

(Written documentation of your bequest is *not* required for Legacy Society membership. However, if you wish to provide us with documentation, you need send only a copy of the page from your will or trust that references your gift and a simple identification of the document itself such as the first page.)

Please return form to:

The Accokeek Foundation, Development Department

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