



A bequest is simple and convenient. You have a number of options.

You can make a bequest for a specific dollar amount or for a percentage of your estate. You can designate your bequest for general use or you can restrict its use. Many individuals establish endowments that honor the memory of a family member or another loved one. These endowments live forever since only the income is used annually. These endowments can be structured to last as long as you desire by restricting the annual payout. Since a will is an important legal document, you should seek an attorney's help. To assist you with this important process, we offer some suggested bequest wording below.

Following are some examples of various types of bequests:

Specific bequests are used to make a gift of a specific dollar amount or specific assets, such as securities, real estate, or personal property.

Residuary bequests are used to give all or a portion of the rest, residue, and remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.

Including DRI in your will

The following includes several examples of suggested bequest wording to benefit the Diabetes Research Institute Foundation.

Each individual situation is unique and, therefore, these examples include only some of the possible gift opportunities. We encourage you to share your final will provision with the Diabetes Research Institute Foundation to ensure that your wishes will be properly followed and recognized.

Percentage of estate for unrestricted purposes

I give, devise, and bequeath to the Diabetes Research Institute Foundation, Inc., a Florida not-for-profit corporation, (Federal ID # 59-1361955) ___% of the rest, residue, and remainder of my estate as an unrestricted gift for the general purposes of the Foundation.

Percentage of estate for specific purposes with an endowment provision

I give, devise, and bequeath to the Diabetes Research Institute Foundation, Inc., a Florida not-for-profit corporation, (Federal ID # 59-1361955) _____ percent (%) of the rest, residue, and remainder of my estate to establish the _____ ENDOWED FUND. The principal of this fund shall be invested as part of Diabetes Research Institute's permanent endowment and in accordance with its policies. The income therefrom is to be used by the Diabetes Research Institute Foundation,

_____.

Specific amount for unrestricted purposes

I give, devise, and bequeath to the Diabetes Research Institute Foundation, Inc., a Florida not-for-profit corporation, (Federal ID # 59-1361955) the sum of \$ _____ as an unrestricted gift for the general purposes of the Foundation.

Specific amount for specific purposes

I give, devise, and bequeath to the Diabetes Research Institute Foundation, Inc., a Florida not-for-profit corporation, (Federal ID # 59-1361955) the sum of \$ _____ in cash or in-kind (or _____ shares of _____ stock) to be used for _____ at the Diabetes Research Institute.

To assist you with your plans, the Diabetes Research Institute Foundation can provide sample language for the program or area you wish to support. This confidential service is available to you without obligation.

Designating the purpose of a bequest:

Unrestricted: The most useful type of bequest is unrestricted, allowing the funds to be allocated by DRI wherever the need is greatest.

Restricted: You may designate your bequest to support a special program or purpose that reflects your personal or professional interest (for example: research, educational programs, faculty chairs, fellowships, etc.).

If the bequest is restricted to a specific purpose, it is important that the following wording be added at the end of the provision. This will ensure that, in the remote possibility a field of study or specified purpose may cease to need funds in the future, an alternate use for the bequest may be determined, in line with the Diabetes Research Institute Foundation's mission to cure diabetes.

“... for so long as the Foundation determines that the need exists. Should the need no longer exist, the Foundation may direct the use of my bequest for a purpose related as closely as possible to that stated above.”