



Chad Ryan Schwickerath  
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## Sample Bequest Language

A gift to Chicago Theological Seminary in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest:

- is easy to arrange,
- will not alter your current lifestyle in any way, and
- can be easily modified to address your changing needs.

### Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:  
*I give and devise to Chicago Theological Seminary Board of Directors (Tax ID # 36-2167014), located in Chicago, IL, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

### Specific Bequest Language

Naming CTS as a beneficiary of a specific amount from your estate is easy:  
*I give and devise to Chicago Theological Seminary Board of Directors (Tax ID # 36-2167014), located in Chicago, IL, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

### Contingent Bequest Language

CTS can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.  
*If (insert name) is not living at the time of my demise, I give and devise to Chicago Theological Seminary Board of Directors (Tax ID # 36-2167014), located in Chicago, IL, the sum of \$\_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

The information presented in this literature is not intended as legal or tax advice.



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## Record of Planned Gift Intention

Thank you for completing this confidential Record of Gift Intention.  
 If you have any questions, please contact the Manager of Alumni & Church Relations, Chad Ryan Schwickerath at 773.896.2434.

Full Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Planned Gift (Bequest) Information

CTS is named as a beneficiary of my will or trust:

For a specified amount of \_\_\_\_\_.

\_\_\_\_\_ percentage.

CTS is named as a beneficiary of the following:

Retirement plan

Life insurance

Bank, investment or other account

Real property

Life-income plan (Trustee's name: \_\_\_\_\_)

My gift is (circle one) RESTRICTED/UNRESTRICTED

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Please return this form to: 1407 E 60th St  
 Chicago, IL 60637