

SPECIFIC BEQUESTS
Specific Property To A Specific Beneficiary

Generally, a memorandum is used to gift small items of specific property to specific individuals. However, if you want to gift larger items of specific property (real estate, automobiles, cash, etc.), please specify the beneficiary and the specific gift of property. If you have more than one beneficiary with a specific bequest, complete a separate form for each beneficiary. After you have finished with your specific bequests, or if you do not want to gift specific assets, please complete a separate form titled, “**Residuary Estate**” to dispose of the remainder of your Estate.

Specific Bequests: Describe all specific bequests of property to be made to this beneficiary (cash, residence, lake lot, etc.). Be specific. Include the address of any real property. If you need more space, attach a separate sheet.

Beneficiary # _____

Beneficiary’s Full Name: _____

Address: _____

Relationship: _____ **Age:** _____ **Phone Number:** _____

Alternate Beneficiaries:

Please provide an alternate beneficiary in case the primary beneficiary is not living at your death:

- Gift should go to the primary beneficiary’s descendants; [_____] OR
- Gift should be shared pro-rata by the residuary beneficiaries named in my Will [_____]; OR
- Gift should go to the following alternate beneficiaries (include Name, address, relationship, age & phone number):

See note # _____. (Include additional information about this bequest and beneficiary on a separate sheet)

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