

**THE CHAPEL HILL FRIENDS MEETING ENCOURAGES YOU  
TO INCLUDE THE MEETING IN YOUR WILL AND ESTATE PLANS**

As you consider including the Meeting in your will and estate plans, we encourage you to discuss your intentions with someone on the Finance Committee or someone else who knows you well. You might consider requesting a clearness committee to aid your decision-making. Consulting with an attorney and/or a financial advisor will also be helpful.

**TO INCLUDE THE MEETING IN YOUR WILL, HERE ARE SUGGESTED CHOICES FOR WORDING:**

“I give to the Chapel Hill Monthly Meeting of the Religious Society of Friends, Chapel Hill, North Carolina:  
(choose one of the alternatives below)

- A. the sum of \$\_\_\_\_\_.”
- B. \_\_\_\_\_% percent of my estate.”
- C. the rest, residue, and remainder of my estate.”

*Note: A fourth bequest alternative exists. It consists of giving property to the Meeting. However, since the Meeting is not equipped to evaluate property, we suggest that you give the property indirectly. That is, in your bequest of property to the Meeting, instruct your executor/executrix to sell the property first and then give the proceeds to the Meeting.*

Observations about the above choices: A specific amount of money, Alternative “A,” may be your first thought. However, “B. percent of my estate,” may actually be a better decision for you and your heirs. With “B” the amount you bequeath will change as your assets change, either increasing or decreasing over time. In other words, a specific amount isn’t “locked in.” Alternative “C” offers another way of gaining flexibility with the amount of your bequest.

**THREE OPTIONS FOR BEQUESTS**

There are three options for you to contemplate as you prepare your will and begin to consider your bequest with your family and your executors.

1. Make an undesignated gift. The needs of our Meeting will surely change over time. Accordingly, we encourage you to leave a gift in your will for the general use of the Meeting, rather than for a specific designated purpose. In that instance, use this phrase: “This is an undesignated bequest. The use of my bequest is to be determined by the Chapel Hill Meeting for Worship with Attention to Business.”
2. Alternatively, you may wish to donate to one of our Meeting’s already-designated purpose accounts:
  - Building Renovations;
  - Care and Counsel.
  - Returning Citizens.
  - Shotts Leadership; or
  - Youth Service.

In this case, use the phrase “This bequest is to go to the \_\_\_\_\_ Fund.”

FOLLOW YOUR DESIGNATED BEQUEST STATEMENT, WHATEVER IT MAY BE, WITH THIS STATEMENT: “The Meeting for Worship with Attention to Business may alter or remove this designation due to changed conditions that make it impossible, impractical or undesirable to fulfill.”

3. Donate for a specific purpose or project for which the Meeting has not yet established a designated purpose account. This option will require approval by the Finance Committee to assure consistency with current activities of the Meeting. It is important to note that according to IRS rules, the Meeting may only accept funds whose designated purpose intends to benefit the Meeting, and not individuals.

Regardless of the option that you choose, you can be confident that your gift will be used to make a real difference to the life of the Chapel Hill Friends Meeting.

Our Meeting will acknowledge gifts in whatever way you feel is most appropriate, or we can make sure that your gift remains anonymous.

**NOTE: YOUR WILL IS NOT THE ONLY WAY TO INCLUDE THE MEETING IN YOUR ESTATE PLANS.** You can also name the Meeting as a primary or contingent beneficiary of a life insurance policy, a retirement plan (e.g. IRA, SEP, 401 K, 403 (b), ESOP, etc.), and/or a trust.

If you have questions about including the Meeting in your estate plans, please contact the clerk of the Finance Committee. Based on your question, s/he will suggest ways for you to gain the answers you seek.

Approved by the Finance Committee August 12, 2021

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