



## GENERAL GUIDELINES

### FOR CHARITABLE GIVING TO THE EDUCATION AND CHARITY FUND OF THE TRUSTEES OF THE SUPREME COUNCIL OF THE AASR OF FREEMASONRY FOR THE NORTHERN MASONIC

THIS PAPER IS TO HELP YOU AND YOUR ESTATE PLANNING PROFESSIONAL INCLUDE US IN YOUR PLANS TO HELP GIVING AND CONFIRM YOUR WISHES BY PROVIDING THE FOLLOWING TEXT:

#### GENERAL BEQUESTS

A GENERAL BEQUEST IS ONE OF THE MOST POPULAR WAYS TO MAKE A GIFT TO ONE OF THE MASONIC CHARITIES. YOU SIMPLY LEAVE A SPECIFIED DOLLAR AMOUNT.

*I GIVE THE SUM OF \$ \_\_\_\_\_ TO THE EDUCATION AND CHARITY FUND OF THE TRUSTEES OF THE SUPREME COUNCIL OF THE ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE NORTHERN MASONIC JURISDICTION OF THE UNITED STATES OF AMERICA, A MASSACHUSETTS CORPORATION HAVING ITS HEADQUARTERS IN LEXINGTON, MASSACHUSETTS FOR ITS GENERAL PURPOSES.*

#### SPECIFIC BEQUESTS

WITH THIS TYPE OF BEQUEST, YOU DESIGNATE A SPECIFIC ASSET FROM YOUR ESTATE. STOCKS, BONDS, MUTUAL FUNDS SHARES, REAL ESTATE, AND PERSONAL PROPERTY (SUCH AS ART WORKS OR ANTIQUES ) CAN CONSTITUTE A SPECIFIC BEQUEST.

*I GIVE \_\_\_\_\_ (INSERT A DESCRIPTION OF THE ASSET HERE ) TO THE EDUCATION AND CHARITY FUND OF THE TRUSTEES OF THE SUPREME COUNCIL OF THE ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE NORTHERN MASONIC JURISDICTION OF THE UNITED STATES OF AMERICA, A MASSACHUSETTS CORPORATION HAVING ITS HEADQUARTERS IN LEXINGTON, MASSACHUSETTS FOR ITS GENERAL PURPOSES.*

#### RESIDUARY BEQUESTS

A RESIDUARY BEQUEST DIRECTS ALL RESIDUE, OR A PERCENTAGE OF THE RESIDUE, OF YOUR ESTATE BE PAID TO THE LEARNING CENTERS AFTER ALL DEBTS, TAXES, AND ALL OTHER BEQUESTS HAVE BEEN PAID.

*I GIVE THE REST OF MY PROPERTY I OWN ON MY DEATH TO THE EDUCATION AND CHARITY FUND OF THE TRUSTEES OF THE SUPREME COUNCIL OF THE ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE NORTHERN MASONIC JURISDICTION OF THE UNITED STATES OF AMERICA, A MASSACHUSETTS CORPORATION HAVING ITS HEADQUARTERS IN LEXINGTON, MASSACHUSETTS FOR ITS GENERAL PURPOSES.*

## PERCENTAGE BEQUESTS

A BEQUEST MAY ALSO BE EXPRESSED AS A PERCENTAGE OF YOUR ESTATE OR OF THE RESIDUARY OF YOUR ESTATE.

*I GIVE \_\_\_\_\_ % OF MY ESTATE TO THE EDUCATION AND CHARITY FUND OF THE TRUSTEES OF THE SUPREME COUNCIL OF THE ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE NORTHERN MASONIC JURISDICTION OF THE UNITED STATES OF AMERICA, A MASSACHUSETTS CORPORATION HAVING ITS HEADQUARTERS IN LEXINGTON, MASSACHUSETTS FOR ITS GENERAL PURPOSES.*

## CONTINGENT BEQUESTS

UNDER THIS SCENARIO, YOU MAY NAME A CHARITY OR CHARITIES TO RECEIVE ALL OR SOME OF YOUR ESTATE IF YOUR PRIMARY HEIRS PREDECEASE YOU. YOU MIGHT DO THIS TO PROTECT YOUR ESTATE FROM EXPENSIVE LITIGATION OR FROM ULTIMATE DISTRIBUTION TO THE STATE OR UNINTENDED BENEFICIARIES.

*IF \_\_\_\_\_ (INSERT OF YOUR HEIR ) PREDECEASES ME OR DISCLAIMS ANY INTEREST IN \_\_\_\_\_ (DESCRIBE THE ASSET OR PORTION OF YOUR ESTATE. ) I GIVE SUCH PROPERTY TO THE EDUCATION AND CHARITY FUND OF THE TRUSTEES OF THE SUPREME COUNCIL OF THE ANCIENT ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE NORTHERN MASONIC JURISDICTION OF THE UNITED STATES OF AMERICA, A MASSACHUSETTS CORPORATION HAVING ITS HEADQUARTERS IN LEXINGTON, MASSACHUSETTS FOR ITS GENERAL PURPOSES.*



THE SUPREME COUNCIL'S OFFICE OF DEVELOPMENT  
WELCOMES THE OPPORTUNITY TO TELL YOU MORE ABOUT  
THE PLANNED GIVING PROGRAMS, AND CONSULT WITH YOU  
AND YOUR ADVISORS ABOUT VARIOUS GIFT IDEAS.

FOR FURTHER INFORMATION ABOUT MAKING A PLANNED GIFT OR OTHER WAYS  
TO SUPPORT THIS OR OTHER SCOTTISH RITE CHARITIES, PLEASE CONTACT US:

[CORNERSTONE@SCOTTISHRITECHARITIES.ORG](mailto:CORNERSTONE@SCOTTISHRITECHARITIES.ORG)

OR

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*SUPPORTING BENEVOLENCES OF 32° MASONS NMJ*