



**COME
OVER &
HELP**

Charitable Bequest Restrictions

In order to achieve the greatest effect, it is best for you not to place restrictions on a bequest, but instead to select a very reputable charity that you trust. The charity should have the discretion to use the funds in the manner that will achieve the greatest good. Many charities have to decline gifts because the well-intentioned restriction is no longer feasible. For example, the bequest may be restricted for use in a certain project or country in which it no longer operates. In this case, the charity may have to decline the gift.

However, if you strongly feel that you would like to restrict your bequest by directing it to a specific project, be sure to discuss such restrictions with the charity, as certain seemingly benign restrictions may be impractical or impossible for the charity to comply with and it may have to reject the gift. Alternatively, the charity may accept the gift but the impact of the gift may be substantially reduced by the restriction. As well, you should have a clause in your will with a provision that if the restriction can no longer be complied with, the charity's board of directors has the ability to vary the use of the gift.