

# GLADSTONE INSTITUTES

## Bequest Basics and Sample Language for Bequests

### Name and ID Number

The official name of Gladstone Institutes is **The J. David Gladstone Institutes**.  
The J. David Gladstone Institutes' Federal Tax ID Number is 23-7203666.

### Sample Bequest Provisions

#### Unrestricted Expendable Bequest

I hereby give \_\_\_\_\_\* to **The J. David Gladstone Institutes**, (hereafter Gladstone Institutes) a life science research organization, to support the objects and purposes of Gladstone Institutes.

#### Unrestricted Endowed Bequest

I hereby give \_\_\_\_\_\* to **The J. David Gladstone Institutes**, (hereafter Gladstone Institutes), a life science research organization. The property comprising this gift may, for investment purposes, be merged with any of the investment assets of Gladstone Institutes, but the gift shall be entered in the organization's books and records as an endowed fund known as **The** \_\_\_\_\_ **Fund** (the "Fund"). Gladstone institutes shall use the endowment payout from the Fund to support the objects and purposes of Gladstone Institutes.

### Expendable Bequest for a Specific Purpose

I hereby give \_\_\_\_\_\* to **The J. David Gladstone Institutes**, (hereafter Gladstone Institutes), a life science research organization, to support its research in the area of:

- Cardiology
- Data Science and Biotechnology
- Neurology
- Virology
- Genomic Immunology

### Endowed Bequest for a Specific Purpose

I hereby give \_\_\_\_\_\* to **The J. David Gladstone Institutes**, (hereafter Gladstone Institutes), a life science research organization. The property comprising this gift may, for investment purposes, be merged with any of the investment assets of Gladstone Institutes, but the gift shall be entered in Gladstone Institutes' books and records as an endowed fund known as **The** \_\_\_\_\_ **Fund** (the "Fund"). Gladstone Institutes shall use the endowment payment from the Fund to support research in \_\_\_\_\_ (name the field of study) at Gladstone Institutes.

If, in the judgment of Gladstone Institutes, changed circumstances should at some future time render the designated use of this gift no longer appropriate, then Gladstone Institutes shall use the gift to further the objects and purposes of Gladstone Institutes, giving consideration to any special interest as evidenced by the proposes described above.

*\* Fill in the blank with the dollar amount, percentage of estate, or specific property you intend to give to Gladstone Institutes.*