



## **Sample Bequest Language for your Will or Revocable Living Trust**

A gift to Restore Hetch Hetchy in your will or revocable trust enables you to support our mission and make a difference in the lives of future generations. The language is generally simple, with variations according to your intentions. Below are a few examples:

### **Specific Gift Language**

Naming Restore Hetch Hetchy as a beneficiary of a specific amount from your estate is easy:

I give and devise to Restore Hetch Hetchy Foundation (Tax ID 77-0551533), located in Berkeley, CA, the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support.

### **Residual Gift Language**

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Restore Hetch Hetchy Foundation (Tax ID 77-0551533), located in Berkeley, CA, \_\_\_\_\_ percent of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support.

### **Contingent Gift Language**

Restore Hetch Hetchy or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Restore Hetch Hetchy Foundation (Tax ID 77-0551533), located in Berkeley, CA, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support.

### **Retirement Plan Beneficiary Language**

You may name Restore Hetch Hetchy (Tax ID 77-0551533) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming Restore Hetch Hetchy as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming Restore Hetch Hetchy as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support Restore Hetch Hetchy free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify Restore Hetch Hetchy. We can also assist you with the proper language for your beneficiary designation to Restore Hetch Hetchy.

#### Customized Language

If you or your attorney would like Restore Hetch Hetchy to provide you with customized beneficiary language that is specific to your goal and interest, please contact me.

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