

# Sample Bequest Language

Wills & Trusts



We work closely with donors and their estate planning attorneys, wealth advisors, accountants and other allied professionals to establish and administer planned gifts.

## Specific Gift

"I give to San Diego Foundation (the sum of \$\_\_\_\_\_) OR (all my right, title and interest in the following described property \_\_\_\_\_). This gift is to be added to the \_\_\_\_\_ Fund.

## Proportional Gift

"I give to San Diego Foundation an amount equal to \_\_\_\_\_% of the total value of the assets in my estate, whatever the amount shall be at the time of my death. This gift is to be added to the \_\_\_\_\_ Fund."

## Residuary Gift

"I give to San Diego Foundation all the residue and remainder of my estate. This gift is to be added to the \_\_\_\_\_ Fund."

## Contingent Gift

"In the event that \_\_\_\_\_ (name of wife, son, brother...) shall not survive me, then I give \_\_\_\_\_ (my home, my securities or any assets) to San Diego Foundation. This gift is to be added to the \_\_\_\_\_ Fund."

San Diego Foundation's Tax ID (EIN) is 95-2942582.