

Island Conservation Planned Giving: Bequest Language for Estate Planning Documents

Outright Bequest

☐ Unrestricted ☐ Restricted

An outright bequest, in which you leave Island Conservation a specified dollar amount or specified assets, such as securities, real estate or tangible property is considered **unrestricted if the gift is intended for general support** of Island Conservation at the discretion of the Leadership Staff and Board of Directors.

Donors may also restrict the use of their bequests for a specific area of charitable support. This may require additional language in your estate planning documents.

Below are four options to consider when making your estate plans. The following language may be used when you create your will, trust, or add a codicil to your existing will:

"I _____ give, devise, and bequeath to Island Conservation, 630 Water Street, Santa Cruz, California 95060, Tax Identification Number 91-1839907":

- a. The sum of \$_____;
- b. _____% of my estate;
- c. the following securities, real estate, or tangible property_____;
- d. or, _____% of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid.

If a gift is restricted:

"The property comprising this gift shall be used for _____(state purpose). If the need for funds for the charitable purpose described above no longer exists at some future date, the Leadership Staff and The Board of Directors are authorized to use these funds in the best interest of Island Conservation."

Please return this confidential form to giving@islandconservation.org.

For more information about Island Conservation's Planned Giving options, please contact:

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