

## EXAMPLES OF SUGGESTED BEQUEST LANGUAGE

*This information is provided as educational in nature. It is not offering legal, tax or accounting advice. Each individual should consult a qualified advisor about his or her specific situation.*

**Legal Name:** Friends of the Santa Cruz Public Libraries  
**Tax ID #:** 94-2612557

The wording in the statements below are only used as examples. Please change the names, numbers or percentages as you desire.

### 1. Bequest of cash

I bequeath the sum of \$ \_\_\_\* to the Friends of the Santa Cruz Public Libraries of Santa Cruz, California, to support the objects and purposes of the Santa Cruz Public Libraries.

### 2. Bequest of a percent of the estate

I devise and bequeath \_\_\_%\* of the remainder and residue of property owned at my death, whether real or personal, and wherever located to the Friends of the Santa Cruz Public Libraries of Santa Cruz, California, to support the objects and purposes of the Santa Cruz Public Libraries.

### 3. Contingent Bequest

If my brother, John Doe, survives me, I devise and bequeath \_\_\_%\* of the remainder and residue of property owned at my death, whether real or personal, and wherever located to John Doe. If John Doe does not survive me, then I devise and bequeath \_\_\_%\* of my residuary estate, whether real or personal property and wherever located to the Friends of the Santa Cruz Public Libraries of Santa Cruz, California, to support the objects and purposes of the Santa Cruz Public Libraries.

### 4. Unrestricted Endowed Bequest:

I hereby give \_\_\_\_\_\* to Friends of the Santa Cruz Public Libraries (hereinafter, "the Friends"). The property comprising this gift may, for investment purposes, be merged with any of the investment assets of the Friends, but the gift shall be entered in the organization's books and records as an endowed fund known as THE \_\_\_\_\_ FUND (the "Fund"). The Friends shall use the endowment payout from the Fund to support the objects and purposes of the Santa Cruz Public Libraries.

### 5. Endowed Bequest for a Specific Purpose:

I hereby give \_\_\_\_\_\* to the Friends of the Santa Cruz Public Libraries (hereinafter, "the Friends"), a nonprofit. The property comprising this gift may, for investment purposes, be

merged with any of the investment assets of the Friends, but the gift shall be entered in the organization's books and records as an endowed fund known as THE \_\_\_\_\_ FUND (the "Fund"). The Friends shall use the endowment payout from the Fund to...

- ...provide books and other materials for the Santa Cruz Public Libraries.
- ...support the
  - o La Selva Beach Branch Library.
  - o Aptos Branch Library.
  - o Capitola Branch Library.
  - o Live Oak Branch Library.
  - o Branciforte Branch Library.
  - o Downtown Santa Cruz Branch Library.
  - o Garfield Park Branch Library.
  - o Scotts Valley Branch Library.
  - o Felton Branch Library.
  - o Boulder Creek Branch Library.
  - o Book Mobile Branch Library.

**To Prepare for the Unexpected:**

*Inclusion of the following language is optional, but suggested, in order to ensure that a bequest designated for a specific use will always remain productive if circumstances change unexpectedly:*

“If, in the judgment of the Friends, changed circumstances should at some future time render the designated use of this gift no longer appropriate, then the Friends shall use the gift to further the objects and purposes of the Santa Cruz Public Libraries, giving consideration to my special interest as evidenced by the purposes described above.”

*\* Fill in the blank with the dollar amount, percentage of estate, or specific property you intend to give to the Friends of the Santa Cruz Public Libraries.*

**Address & Contact Information:**  
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