

CALIFORNIA-NEVADA UNITED METHODIST FOUNDATION

Sample Bequest Language

BEQUEST FOR FOUNDATION'S GENERAL PURPOSES

Language Suggestions

The bequest may be worded similar to the following:

I give, devise, and bequeath to the California-Nevada United Methodist Foundation, a not for profit corporation organized under the laws of the State of California, with headquarters at 1276 Halyard Drive, West Sacramento, California, _____ percent of my estate (or name of a particular property) for its general purposes.

Or, after shares have been designated to family members, the bequest may say:

All the rest, residue, and remainder of my estate, both real and personal, wherever situated, I give, devise, and bequeath to the California-Nevada United Methodist Foundation, a not for profit corporation organized under the laws of the State of California, with headquarters at 1276 Halyard Drive, West Sacramento, California, for its general purposes.

BEQUEST FOR FOUNDATION PERMANENT ENDOWMENT FUND

Language Suggestions

To add to an existing endowment fund, or to create your own named permanent endowment fund at the Foundation, here are some suggestions:

I give, devise, and bequeath (state amount, asset, or percentage of estate) to the California-Nevada United Methodist Foundation ("Foundation"), a not for profit corporation organized under the laws of the State of California, with headquarters at 1276 Halyard Drive, West Sacramento, California, to be added to the _____ Fund (e.g., the J. Allen Walker Fund, Stewardship Endowment Fund, etc.) or to establish the (insert your name) Endowment Fund, the income only as defined at the discretion of the Foundation Board of Directors, shall be used to provide _____ (e.g., endowment development services, planned giving services or other financial ministries of the Foundation).

Note: It is the current policy of the Board of Directors that a minimum bequest in the amount of \$10,000 is necessary to create a permanent named endowment fund at the Foundation.

Please note that this sample bequest is provided for educational purposes only. It should not be interpreted as legal advice; please consult with your attorney.