

Simple Ways to Leave a Legacy

American River Natural History Association

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Benefits to You

- Most gifts cost you nothing now.
- Some gifts pay you income.
- In most cases, you can change your beneficiaries at any time—you are not obligated by a decision you make today.
- You can take care of your family and other loved ones and provide for the future of Effie Yeaw Nature Center. A small percentage of your estate can make a big difference.
- There is no minimum amount—every gift is important.

Create Your Legacy

Here are two of the simplest and most popular gifts:

Gifts by Bequest

- You name the American River Natural History Association as a beneficiary in your will or living trust, designating the gift of your choice (for example, cash, real estate, personal property or securities).
- You maintain complete control of your assets during your lifetime, and can save on income taxes, capital gains taxes and estate taxes.

Gifts by Beneficiary Designations

- It's easy—request a change of beneficiary form from the company holding your assets (401(k) and other retirement accounts, life insurance policies, and other assets) and include the American River Natural History Association as a full or partial beneficiary.
- You reduce income taxes and possibly estate taxes for your loved ones.

Proper Bequest Language

Percentage

"I give, devise, and bequeath to the American River Natural History Association, a nonprofit corporation of the State of California, located in Carmichael, CA, (tax identification number 94-2766075), _____ % of my estate."

Specific

"I give, devise, and bequeath to the American River Natural History Association, a nonprofit corporation of the State of California, located in Carmichael, CA, (tax identification number 94-2766075),

Choose:

- 1) the sum of \$_____."
- 2) _____ shares of stock in _____ Company.", or
- 3) My real property commonly known as _____."

Residual

"I give, devise, and bequeath to the American River Natural History Association, a nonprofit corporation of the State of California, located in Carmichael, CA, (tax identification number 94-2766075), all the residue of my estate, including real personal property."

Contingent

"In the event of the death of any of the beneficiaries, I give, devise, and bequeath to the American River Natural History Association, a nonprofit corporation of the State of California, located in Carmichael, CA, (tax identification number 94-2766075), (percentage, specific, or residual language as above)."

If you would like your bequest to be used for a specific program, add the following language: "to be used for _____."

*This information is not intended as legal, accounting or other professional advice.
For assistance in charitable planning, consult an attorney for legal advice or the services of a qualified professional.*