



# SAMPLE BEQUEST LANGUAGE FOR YOUR WILL OR TRUST

A gift to the California Academy of Sciences through your will or living trust helps advance scientific research, learning and discovery. A bequest is easy to arrange in three simple parts, will not alter your current lifestyle in any way, and can be easily modified to address your changing needs. Below, find sample language to help you make a gift to benefit the Academy.

## 1. NAME THE CALIFORNIA ACADEMY OF SCIENCES AS A BENEFICIARY

Provide the name California Academy of Sciences and our tax identification number:

*I give to the California Academy of Sciences (Tax ID #94-1156258),  
located in San Francisco, CA ...*

## 2. IDENTIFY WHAT YOU WISH TO GIVE TO BENEFIT THE ACADEMY

The Academy can accept cash, stocks, retirement funds, bank accounts and some forms of real property. If you wish to leave the Academy a specific item or property, please work with us in advance to ensure we can accept your gift.

Select the statement that best fits your needs:

- \_\_\_\_\_ percent of my estate (provide a specific percentage)
- the sum of \$\_\_\_\_\_ (provide specific dollar amount)
- my \_\_\_\_\_ (list a specific asset)
- the remainder of my estate

## 3. INCLUDE WHAT YOU WOULD LIKE YOUR GIFT TO ACCOMPLISH

Your gift will support the Academy's highest priorities, scientific discoveries, cutting-edge research, science education, animal care and enrichment, and other critical activities that fulfill its mission to explore, explain, and sustain life. If you wish to leave your gift for a more specific purpose, please consult with the Academy prior to finalizing your documents to ensure your gift can be used as intended as the Academy grows and evolves over time.

*... to support its mission.*

*... to be used for the support of (a specific fund or program).*



### CONTINGENT AND RESIDUAL GIFT LANGUAGE

The Academy can be named as a contingent or residual beneficiary in your will or living trust if one or more of your specific bequests cannot be fulfilled:

*If [insert name] should predecease me [or no longer exists], I give the remainder of my estate [or a percentage or the sum of \$ \_\_\_\_\_ ] to the California Academy of Sciences (Tax ID #94-1156258), located in San Francisco, CA.*

### RETIREMENT PLAN BENEFICIARY LANGUAGE

Naming the Academy as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan allows 100% of your hard-earned savings to avoid taxes and be put to its fullest use to advance science and learning—and is easy to do.

1. Request a change-of-beneficiary form from your plan administrator. You may be able to do it all online.
2. List the California Academy of Sciences as a non-profit organization beneficiary using the Tax ID #94-1156258.
3. When you have finished, please return the form to your plan administrator and notify the Academy.

### OTHER CONSIDERATIONS

Every individual has unique needs and goals. Ask your legal, financial and/or tax professionals to advise you on how you can make a generous gift that is best for your specific situation. The Academy is not engaged in legal or tax advisory service and cannot provide legal or tax advice.

Contact the California Academy of Sciences:

Debra Holcomb, Associate Director, Gift Planning, is happy to speak with you at (415) 379-5202 to answer your questions and learn about your Academy interests. She can also be reached at [dholcomb@calacademy.org](mailto:dholcomb@calacademy.org).

*Please let us know about your plans, so we can thank you and welcome you to the Eastwood Associates, a very special group of Academy benefactors.*

Visit our website at [calacademy.org/plannedgiving](http://calacademy.org/plannedgiving) for more information.