



## **SAMPLE LANGUAGE FOR BEQUESTS**

### **SPECIFIC PURPOSE BEQUESTS**

“ (A specific asset) or (the sum of \$ \_\_\_\_\_) or (\_\_\_\_% of the rest, residue, and remainder of my estate) to Santa Catalina School, a California nonprofit corporation located in Monterey, California, to be used for \_\_\_\_\_ endowment.”

Santa Catalina School requests that donors or their attorneys contact the Development Office to discuss options for giving for one or more specific purposes. Santa Catalina School’s educational programs and activities may change over time, and the needs of this generation of students may not be the same as those of the next. Therefore, whenever you indicate a particular purpose for your bequest, it is advisable to grant Santa Catalina the authority to respond to changing needs. You may do this by including the following language with your bequest: “If at any time in the judgment of the Santa Catalina School Board of Trustees, it is impossible or impracticable to carry out exactly the designated purpose, the Santa Catalina School Board of Trustees shall determine an alternative purpose as near as possible to the designated purpose.”

The sample language provided above does not constitute legal advice and should not be relied upon as such. Rather, it is intended to provide you a variety of options as you consider making a bequest to Santa Catalina School. Santa Catalina would be happy to consult with you and your estate planning attorney should you have any questions about options in making bequests to Santa Catalina School. Thank you.