



LEAVE A LEGACY

CHARLES WRIGHT ACADEMY PLANNED GIVING

Sample Bequest Language

Your bequest to Charles Wright Academy can take a variety of forms and the nature of your assets or your interests may make one type of bequest more appropriate than another. Here is a sampling of suggested bequest language to discuss with your financial advisor or lawyer:

General Bequest: This is one of the most popular ways to make a gift. You simply leave CWA a specified dollar amount.

"I give the sum of \$_____ to the Trustees of Charles Wright Academy, a charitable non-profit organization located in Tacoma, Washington, for its general educational purposes."

Specific Bequests: You can designate that CWA receives a specific asset from your estate. Stocks, bonds, mutual fund shares, real estate, and personal property can constitute a specific bequest.

"I give _____ (insert description of the asset) to the Trustees of Charles Wright Academy, a charitable non-profit organization located in Tacoma, Washington, for its general educational purposes."

Residuary Bequest: You can specify that the residue or a percentage of the residue of your estate be paid to CWA after all debts, taxes, expenses, and bequests have been paid.

"I give the rest of the property I own at my death to the Trustees of Charles Wright Academy, a charitable non-profit organization located in Tacoma, Washington, to be used for its general educational purposes." Or, "I give _____% of the rest of the property I own at my death to the Trustees of Charles Wright Academy, a charitable non-profit organization located in Tacoma, Washington, to be used for its general educational purposes."

Percentage Bequest: A bequest may also be expressed as a percentage of your estate.

"I give _____% of my estate to the Trustees of Charles Wright Academy, a charitable non-profit organization located in Tacoma, Washington, for its general educational purposes."

Codicil to Your Will: If you already have a will and wish to change a beneficiary or add a bequest to Charles Wright Academy, ask your lawyer to draft a codicil for you to sign. All provisions of your existing will shall be retained except those which are modified by the codicil.

Charitable Trust by Will: If you set up a trust by will, your heirs receive income from an asset during their lifetimes, and then at their deaths, the principal goes to Charles Wright Academy.

For more information on how Estate Gifts might be a helpful tool in your philanthropic planning, please contact the Office of Development at giving@charleswright.org.

*Charles Wright Academy does not provide legal or tax advice.
We recommend that you seek your own legal and tax counsel in connection with gift and planning matters.*