



SUGGESTED LANGUAGE FOR A WILL OR REVOCABLE LIVING TRUST

SPECIFIC SUM OF MONEY

"I give to Share, EIN 91-1205119, a nonprofit corporation of the State of Washington, currently located at 2306 NE Andresen Rd, Vancouver, WA 98661, its successors and assignees, *the sum of* \$ _____, for addition to the _____ FUND, OR with whom I have a letter of intent on file.

SPECIFIC PROPERTY

"I give to Share, EIN 91-1205119, a nonprofit corporation of the State of Washington, currently located at 2306 NE Andresen Rd, Vancouver, WA 98661, its successors and assignees, *insert a description of the property, e.g.,* "_____ shares of stock in _____ Company" or "real property located at _____ with legal description of _____" for addition to the _____ FUND, OR with whom I have a letter of intent."

RESIDUAL

"I give to the Share, EIN 91-1205119, a nonprofit corporation of the State of Washington, currently located at currently located at 2306 NE Andresen Rd, Vancouver, WA 98661, its successors and assignees, *all or* _____% of the rest, residue, and remainder of my estate for addition to the _____ FUND, OR with whom I have a letter of intent."

CONTINGENT

"If [name/s of primary beneficiaries] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to Share, EIN 91-1205119, a nonprofit corporation of the State of Washington, currently located at 2306 NE Andresen Rd, Vancouver, WA 98661, its successors and assignees, (*describe amount of cash, specific property or percentage of residual estate*) for addition to the _____ FUND, OR with whom I have a letter of intent."

ALTERNATIVE TO A BEQUEST – A BENEFICIARY DESIGNATION

In some cases, donors prefer to name Share as a beneficiary of all or part of a financial arrangement such as a retirement plan, IRA, or life insurance policy. Such gifts can have several advantages. They are easy to make or modify, allow you to retain control of your assets during your lifetime, generally avoid the delays associated with probate, and are a very tax-wise way to give. Certain assets are potentially subject to a double tax – income taxes payable by your heirs in addition to any applicable estate taxes. In contrast, gifts to Share are tax exempt and 100 percent of your gift is put to work as you direct. Be sure to consult your legal and tax advisors regarding what options might be best for you.

FOR MORE INFORMATION

Contact Kim Hash, Director of Development and Communication: devdir@sharevancouver.org; 360.952.8227 or Diane McWithey, Executive Director: execdir@sharevancouver.org, 360.952.8216.

The above information is provided as a courtesy for use with your attorney and does not constitute legal, tax or financial advice. Share encourages you to seek professional legal, estate planning and financial advice before deciding on a particular gift arrangement.