



SUGGESTED WORDING FOR BEQUESTS AND TRUSTS

While your attorney is responsible for the legal aspects of your planning, we are pleased to provide the following information as a courtesy to attorneys and their clients.

PROPORTIONAL BEQUEST

"I give to The San Diego Foundation, an amount equal to ___% (_____ percent) of the total value of the assets in my estate, whatever the amount shall be at the time of my death. This gift is to be added to the _____ Fund." (IF A FUND HAS NOT BEEN ESTABLISHED, PLEASE CONTACT US OR REPLACE THE PRIOR SENTENCE WITH THE FOLLOWING) "This gift is to be used in such a manner as the Board of Governors of said Foundation shall, in its sole discretion, determine."

RESIDUARY BEQUEST

"I give to The San Diego Foundation, all the residue and remainder of my estate. This gift is to be added to the _____ Fund." (IF A FUND HAS NOT BEEN ESTABLISHED, PLEASE CONTACT US OR REPLACE THE PRIOR SENTENCE WITH THE FOLLOWING) "This gift is to be used in such a manner as the Board of Governors of said Foundation shall, in its sole discretion, determine."

SPECIFIC BEQUEST

"I give to The San Diego Foundation, (the sum of \$ _____) **OR** (all my right, title and interest in the following described property _____). This gift is to be added to the _____ Fund." (IF A FUND HAS NOT BEEN ESTABLISHED, PLEASE CONTACT US OR REPLACE THE PRIOR SENTENCE WITH THE FOLLOWING) "This gift is to be used in such a manner as the Board of Governors of said Foundation shall, in its sole discretion, determine."

CONTINGENT BEQUEST

"In the event that _____ (name of wife, son, brother...) shall not survive me, then I give _____ (my home, my securities or any assets) to the San Diego Foundation. This gift is to be added to the _____ Fund." (IF A FUND HAS NOT BEEN ESTABLISHED, PLEASE CONTACT US OR REPLACE THE PRIOR SENTENCE WITH THE FOLLOWING) "This gift is to be used in such a manner as the Board of Governors of said Foundation shall, in its sole discretion, determine."