

Sample Bequest Language

Wills & Trusts



We work closely with donors and their estate planning attorneys, wealth advisors, accountants and other allied professionals to establish and administer planned gifts.

Specific Gift

"I give to 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.

Proportional Gift

"I give to San Diego Foundation an amount equal to _____% 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."

Residuary Gift

"I give to San Diego Foundation all the residue and remainder of my estate. This gift is to be added to the _____ Fund."

Contingent Gift

"In the event that _____ (name of wife, son, brother...) shall not survive me, then I give _____ (my home, my securities or any assets) to San Diego Foundation. This gift is to be added to the _____ Fund."

San Diego Foundation's Tax ID (EIN) is 95-2942582.