



Bequests

A bequest is a gift from your estate after your death.

Bequest gifts have some specific tax and financial planning advantages: they cost nothing at the present time and do not impact your current financial picture; they may be changed if your personal circumstances change; and they are exempt from federal estate taxes. In addition, many donors find their estate may be in a better position to make a larger gift to LifeRing than they might be able to make during their lifetime.

To make a bequest gift to LifeRing, you must execute a new will or trust document; execute a codicil to your present will; or execute an amendment to your present trust instrument.

Specific Bequest

Use this language to make an unrestricted gift of a specific dollar amount:

I hereby give to LifeRing, Inc., a California 501(c)(3) organization, the sum of \$[specific dollar amount] to support the purposes of LifeRing, Inc., as determined by its Board of Directors.

Residual Bequest Language

Use this language to make an unrestricted gift of all or some specific percentage of your estate after estate administrative expenses and specific bequests have been satisfied:

I hereby give to LifeRing, Inc., a California 501(c)(3) organization, the residue of my estate to support the purposes of LifeRing, Inc., as determined by its Board of Directors.

or

I give to LifeRing, Inc., a California 501(c)(3) organization [specific percentage amount]% of the residue of my estate to support the purposes of LifeRing, Inc., as determined by its Board of Directors.



Contingent Bequest

Use this language to name LifeRing an alternate beneficiary of all (or a portion of) your estate. LifeRing will receive the bequest only if your primary beneficiary/ies do not survive you.

If [beneficiary name is/beneficiary names are] not living at the time of my death, I give to LifeRing, Inc., a California 501(c)(3) organization,

- *the sum of \$ specific dollar amount or*
- *the residue of my estate or*
- *specific percentage amount% of the residue of my estate*

to support the purposes of LifeRing, Inc., as determined by its Board of Directors.

Future Considerations

Inclusion of the following language is optional, but highly recommended.

If, in the judgment of its Board of Directors ("Board"), changed circumstances should at some time render the designated use of this gift impossible or impractical or the designated use is determined to be in conflict with any federal, state, or local law, regulation, or ordinance, the Board, in consultation with the Donor(s), if possible, will direct the use this gift to best further the purposes of LifeRing, Inc., in a manner congruent to the intent of the Donor(s), as expressed in the original gift documentation.



Additional Information and Personalized Assistance

LifeRing encourages donors who wish to make a gift restricted to a specific purpose chosen by the donor to contact the LifeRing Service Center to discuss customized, specific language appropriate to your philanthropic goals.

Additionally, LifeRing encourages donors who wish to make an endowment gift (a gift that provides income to LifeRing in perpetuity), whether restricted or unrestricted, to contact LifeRing Service Center. The Service Center can provide information about the minimum gift threshold required to establish an endowment as well as customized, specific language.

LifeRing
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LifeRing strongly suggests donors consult their own personal legal and tax advisors as part of their consideration of making a planned gift to LifeRing or any other charitable organization.

Name and Tax I.D. Number

LifeRing's official name is LIFERING, INC.
Our federal tax I.D. number is #94-3267919