

General bequests are legacies left to certain people or causes that come from the general value of the estate, and are made by designating a specific dollar amount or a particular asset to the recipient.

Sample Bequest for General Purposes:

"I give, devise, and bequeath to HEAL THE BAY, a California Nonprofit Corporation, the sum of \$_____ (or a description of the specific asset), to be used for its general charitable purposes."

Specific Bequests** are made when a particular item or property is bequeathed for a designated purpose. (i.e., (*** give an example, if applicable, such a beach-cleanup day))*

Sample Bequest for Specified Purposes:

"I give, devise, and bequeath to HEAL THE BAY, a California Nonprofit Corporation, the sum of \$_____ (or a description of a specific asset), to be used for the following purpose: (state the purpose). If at any time in the judgment of officers or directors of HEAL THE BAY it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose."

***Residuary bequests** are made when you intend to leave all or fraction of your estate after other terms of your will have been satisfied.*

Sample Residuary Bequest:

"I give, devise, and bequeath to HEAL THE BAY, a California Nonprofit Corporation, all [or state the fraction or percentage] of the rest, residue and remainder of my estate, both real and personal, to be used for its general charitable purposes."

***Contingency bequests** allow you to leave a portion of your estate to a particular charity if your named beneficiary does not survive you.*

Sample Contingency Bequest:

"I give, devise and bequeath the rest, residue and remainder of my estate, both real and personal, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I give, devise and bequeath the rest, residue and remainder of my estate, both real and personal, to HEAL THE BAY, a California Nonprofit Corporation, to be used for its general charitable purposes."

The material presented on this website is not offered as legal or tax advice, but merely an illustrative example. Please consult with an Estate Planning lawyer or other professional advisor to discuss your contemplated gift. When considering charitable giving, the services of a tax, legal, or financial advisor should be obtained.