



LEAVE A CHARITABLE BEQUEST

Your passion and commitment for SHELTER, Inc. can endure with a bequest or other planned gift. This document provides specific language to make it easy for you to leave a legacy in your will or trust.

Sample Bequest Language

The following four types of bequests direct your gift to SHELTER, Inc.

Percentage

"I give, devise, and bequeath to SHELTER, Inc., a California nonprofit benefit corporation (federal tax ID number 68-0117241), located at 1333 Willow Pass Road, Suite 206, Concord, California, 94520, and its successors and assignees ____percent of my estate."

Specific

"I give, devise, and bequeath to SHELTER, Inc., a California nonprofit benefit corporation (federal tax ID number 68-0117241), located at 1333 Willow Pass Road, Suite 206, Concord, California, 94520, and its successors and assignees (the sum of \$_____) OR (____ shares of stock in _____company) OR (all my right, title, and interest in the following described personal property_____)."

Residual

"I give, devise, and bequeath to SHELTER, Inc., a California nonprofit public benefit corporation (federal tax ID number 68-0117241), located at 1333 Willow Pass Road, Suite 206, Concord, California, 94520, and its successors and assignees all the rest and residue of my estate, including real and personal property."

Contingent

"In the event all of the beneficiaries named herein predecease me or are otherwise ineligible to receive a distribution from my estate, I give, devise, and bequeath to SHELTER, Inc., a California nonprofit benefit corporation (federal tax ID number 68-0117241), located at 1333 Willow Pass Road, Suite 206, Concord, California, 94520, and its successors and assignees (percentage, specific, or residual language as above)."

We understand that each person's situation is unique. Please contact us to discuss your personal goals and circumstances and/or if you wish to set up a permanent endowment fund. SHELTER, Inc. staff does not provide tax, legal, or accounting advice.

For further information please contact Julie Clemens, Director of Development, at 925-957-7572 or via e-mail at Julie.Clemens@shelterinc.org. Join our Legacy Society!