



## SAMPLE BEQUEST LANGUAGE

A gift to Shenandoah National Park Trust through your will or living trust helps you ensure Shenandoah's grandeur for the future. A bequest is easy to arrange, will not alter your current lifestyle in any way, and can be easily modified to address your changing needs. Below, find sample language to help you make a gift to benefit Shenandoah.

### ***Bequest of a Specific Dollar Amount:***

I hereby give, devise and bequeath \_\_\_\_\_ and No/100 dollars (\$DOLLARS) to Shenandoah National Park Trust a non-profit organization located 1750 Allied St. Suite C, Charlottesville VA 22903. (Tax ID #20-8685310), to be used for general purposes.

### ***Percentage Bequest:***

I hereby give, devise and bequeath \_\_percent (\_\_%) of my total estate, determined as of the date of my death to Shenandoah National Park Trust a non-profit organization located 1750 Allied St. Suite C, Charlottesville VA 22903. (Tax ID #20-8685310), to be used for general purposes.

### ***Bequest of Specific Real Estate:***

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to Shenandoah National Park Trust a non-profit organization located 1750 Allied St. Suite C, Charlottesville VA 22903. (Tax ID #20-8685310), to be used for general purposes.

### ***Residual Bequest:***

I hereby give, devise and bequeath to Shenandoah National Park Trust a non-profit organization located 1750 Allied St. Suite C, Charlottesville VA 22903. (Tax ID #20-8685310), ALL OR A PERCENTAGE of the rest, residue and remainder of my estate, to be used for general purposes.

### ***Contingent Bequest:***

If (primary beneficiary) does not survive me, I hereby give, devise and bequeath to Shenandoah National Park Trust a non-profit organization located 1750 Allied St. Suite C, Charlottesville VA 22903. (Tax ID #20-8685310), DESCRIPTION to be used for general purposes.

### ***Retirement Plan Beneficiary Language:***

Naming Shenandoah National Park Trust as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh, or profit-sharing pension plan allows your hard-earned savings to avoid taxes and be put to their fullest use to benefit Shenandoah National Park and is easy to do.

1. Simply request a change-of-beneficiary form from your plan administrator.
2. Shenandoah National Park Trust as a non-profit organization beneficiary using the Tax ID #20-8685310.
3. When you have finished, please return the form to your plan administrator, and notify Shenandoah National Park Trust.

Please contact us if you have any questions about how to make a bequest to the Trust or to request any additional information that might be helpful to you and your attorney as you consider making a bequest to us.

If you have included a bequest for us in your estate plan, please contact us to let us know. We would like to thank you and recognize you for your gift.



## Intent to Make A Planned Gift

Completion of this form is not intended to be legally binding, but notification of intent.

Shenandoah Forever is the Trust's planned giving society, it is a community of thoughtful supporters who are leaving a legacy ensuring **Shenandoah National Park** remains resilient for future generations to enjoy!

I/we would like to *make preserving Shenandoah part of my/our legacy* and I/we have included Shenandoah National Park Trust in my/our estate plans.

Name(s):

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Address:

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Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Please recognize me/us in Shenandoah Forever Legacy Society as:

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I/we wish to remain anonymous.

**Please indicate your planned gift below:**

Bequest

Life Insurance Policy Beneficiary

Retirement Plan Beneficiary

Charitable Remainder Trust

Other \_\_\_\_\_

**This gift will be:**

A specific amount: \$ \_\_\_\_\_

A gift of a specific asset \_\_\_\_\_

A percentage of the residuary of my estate, trust or retirement plan, \_\_\_\_\_ percent

Wish not to disclose

We have included a copy or part of our will.

**Purpose of the planned gift to Shenandoah National Park Trust:**

Unrestricted gift to provide maximum flexibility for Shenandoah National Park Trust to use for greatest need.

For a specific purpose:  Experience Shenandoah  Stewards of Shenandoah  Wild Shenandoah  Stories of Shenandoah  
 Endowment

Signature(s)

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Date: \_\_\_\_\_

Date: \_\_\_\_\_

**PLEASE RETURN FORM TO:** Jessica Cocciolone, Executive Director, 1750 Allied St. Suite C, Charlottesville VA 22903

Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional financial advisor. All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. We understand that you may need to use estimates rather than exact figures. Shenandoah National Park Trust is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #20-8685310, Contributions are deductible as allowed by law.