



BEQUEST LANGUAGE

Suggested Language for Charitable Bequests and Distribution

The sample bequest language is offered for your legal counsel's consideration in preparing your will or trust. Consult your attorney on the appropriate wording to reflect your own goals and intentions.

OUTRIGHT BEQUEST OR DISTRIBUTION

I give _____ [e.g., dollar amount, specific property, residuary estate, entire estate] to Meals That Connect, a California nonprofit corporation, to be used for charitable purposes.

CONTINGENT BEQUEST OR CONTRIBUTION

In the event that _____ [name of primary beneficiary] shall not survive me, then I give _____ [e.g., dollar amount, specific property, residuary estate, entire estate] to Meals That Connect, a California nonprofit corporation.

DISTRIBUTION FROM A TRUST TO CREATE OR ADD A FUND

Upon the death of the donor, the Trustee shall distribute all of the principal and income of the Trust (other than any amount due) _____ to Meals That Connect, a California nonprofit corporation.

This distribution to Meals That Connect shall be used to add to or create a component fund to be known as _____ Fund, which shall be administered in accordance with the terms set forth in the _____ Fund Agreement with Meals That Connect. In the event that the donor fails to execute such agreement, this gift shall be used for such general and charitable purposes as the Board of Directors of Meals That Connect shall determine, in its sole discretion, as set forth in the Bylaws of Meals That Connect.



ABOUT US

Every weekday, Meals That Connect provides free, healthy, noontime meals to over 1,000 seniors throughout San Luis Obispo County. Seniors gather at one of ten Countywide dining sites to dine together, exchange stories, and develop friendships.

Volunteer drivers deliver meals to seniors who are unable to leave their homes, provide regular companionship, and utilize these frequent visits to check on the elders' safety.

For additional information contact: **Brandee Puett, Resource Manager** at brandee@mealsthatconnect.org or call (805) 541-3312 ext. 103

Suggested Language for Charitable Bequests and Distribution

BEQUEST IN A WILL TO CREATE OR ADD A FUND

I give _____ [e.g., dollar amount, specific property, residuary estate, entire estate] to Meals That Connect, a California non-profit corporation.

This gift shall be used to add to or create a component fund to be known as the _____ Fund, which shall be administered in accordance with the terms set forth in the Fund Agreement with Meals That Connect. In the event that I fail to execute such agreement, this gift shall be used for such general and charitable purposes as the Board of Directors of Meals That Connect shall determine, in its sole discretion, as set forth in the Bylaws of Meals That Connect.

BEQUEST IN A WILL TO CREATE A TESTAMENTARY CHARITABLE GIFT ANNUITY AND TESTAMENTARY FUND

I give _____ [e.g., dollar amount, specific property, residuary estate, entire estate] to Meals That Connect, a California non-profit corporation.

This gift shall be used to establish a Charitable Gift Annuity at Meals That Connect for the benefit of _____ [name or names of life annuitant(s)]. Upon the annuitant's death [or if 2 annuitants, "the last to die of the annuitants"], the remaining principal shall be used to create a component fund to be known as the _____ Fund, which shall be administered in accordance with the terms set forth in the _____ Fund agreement with Meals That Connect. In the event that I fail to execute such agreement, this gift shall be used for such general and charitable purposes as Meals That Connect Board of Directors shall determine, in its sole discretion, as set forth in the Bylaws of Meals That Connect.

DISTRIBUTION FROM A TRUST TO CREATE A TESTAMENTARY CHARITABLE GIFT ANNUITY AND TESTAMENTARY FUND

Upon the death of the donor, the Trustee shall distribute all of the principal and income of the Trust (other than any amount due) _____ to Meals That Connect, a California nonprofit corporation.

This distributions to Meals That Connect shall be used to add to or create a component fund to be known as _____ Fund, which shall be administered in accordance with the terms set forth in the _____ Fund Agreement with Meals That Connect. In the event that the donor fails to execute such agreement, this gift shall be used for such general and charitable purposes as the Board of Directors of Meals That Connect shall determine, in its sole discretion, asset forth in the Bylaws of Meals That Connect.