



Sample Language for Charitable Bequests in Wills or Trusts

Thank you for requesting information about a bequest benefiting The Trumpeter Swan Society; we are grateful that you asked. By including a charitable component in your estate or financial plans, you are ensuring the future of healthy, vital swan populations for generations to come.

Example Bequest Language

Please share this sample language below with your legal counsel. As you plan your estate, you may designate your gifts to The **Trumpeter Swan Society**. These unrestricted gifts are added to a Bequest Fund to ensure the future of trumpeter swans.

As an option, you may wish to designate a restricted gift to benefit a specific program or project of our organization. We are available to work with your professional advisors, but The Trumpeter Swan Society does not provide legal or tax advice.

Unrestricted Bequests

The following is suggested language for unrestricted bequests to be used for the greatest needs of The Trumpeter Swan Society.

I (we) hereby give to The Trumpeter Swan Society, a nonprofit, 501 (c) 3 charity with its principal office in Plymouth, Minnesota, **(CHOOSE ONE)**

- The sum of \$_____ **or**
- _____% of my estate **or**
- All my rest, residue, and remainder of my estate

Bequests for a Specific Purpose

I (we) hereby give to The Trumpeter Swan Society, a nonprofit, 501 (c) 3 charity with its principal office in Plymouth, Minnesota, **(CHOOSE ONE)**

- The sum of \$_____ **or**
- _____% of my estate **or**
- All my rest, residue, and remainder of my estate

To be used for (state purpose)_____. It is understood and agreed that should the purpose for which this bequest is instituted cease to exist, then The Trumpeter Swan Society may devote said bequest for such other uses and purposes as it determines to be in accordance with my original intent in making this gift.

Giving to The Trumpeter Swan Society

The Trumpeter Swan Society Official Name

The official name for The Trumpeter Swan Society is *The Trumpeter Swan Society*. This is the preferred name for all gifts and bequests. Gifts should not be made payable to or in the name of a program. Directions restricting gifts should be explained in a cover letter accompanying the gift.

Our Federal Tax Identification number is 23-7220654.

Our address is 12615 Rockford Rd., Plymouth, MN 55441

Tax Exempt Status

The Trumpeter Swan Society is recognized as a charitable organization under Internal Revenue Code 501(c)3. A copy of our IRS letter of determination is available upon request at 715-441-1994