



## Bequest Language

Your attorney or estate planning advisor can help you include Monterey College of Law, San Luis Obispo College of Law, and/or Kern County College of Law in your estate plan. You may also choose to support the collective good of all our law schools by designating an unrestricted gift to Monterey College of Law.

Here are some **examples of basic bequest language** to assist you and your advisors in planning.

### Bequest of a Specific Dollar Amount

"I give, devise and bequeath \_\_\_\_\_ and No/100 dollars (\$Dollars) to Monterey College of Law (or name the specific College), a nonprofit organization located at 100 Colonel Durham Street, Seaside, CA, 93955 (or address of the specific College), Federal Tax ID #94-2202421, for Monterey College of Law's (or name the specific College) general use and purpose.

### Percentage Bequest

"I give, devise and bequeath \_\_\_\_ percent (\_\_\_%) of my total estate, determined as of the date of my death, to Monterey College of Law (or name the specific College), a nonprofit organization located at 100 Colonel Durham Street, Seaside, CA, 93955 (or address of the specific College), Federal Tax ID #94-2202421, for Monterey College of Law's (or name the specific College) general use and purpose.

### Residual Bequest

"I give, devise and bequeath all or a percentage of the rest, residue and remainder of my estate to Monterey College of Law (or name the specific College), a nonprofit organization located at 100 Colonel Durham Street, Seaside, CA, 93955 (or address of the specific College), Federal Tax ID #94-2202421, for Monterey College of Law's (or name the specific College) general use and purpose.

### Contingent Bequest

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to Monterey College of Law (or name the specific College), a nonprofit organization located at 100 Colonel Durham Street, Seaside, CA 93955 (or address of the specific College), Federal Tax ID #94-2202421, (description of asset) for Monterey College of Law's (or name the specific College) general use and purpose.

If your gift is one of real estate or personal property, the wording would be changed accordingly. If you are setting up an endowed scholarship, the specifics of how the fund is to be administered and the award criteria would be documented in a Fund agreement we would customize for you. And there may be other ways you might fund the scholarship through your estate, for example by naming Monterey College of Law, San Luis Obispo College of Law and/or Kern County College of Law as the beneficiary of a trust or retirement fund.

## **Restricted Bequests**

If you are considering a bequest but would like to ensure that your bequest will be used for a specific purpose, please let us know. We would be happy to work with you and your attorney or estate planning advisor to help you identify ways to give and meet your charitable objectives, including how to craft language to accomplish your goals.

If you are making a restricted bequest, we recommend that you include the following provision to give Monterey College of Law, San Luis Obispo College of Law, and/or Kern County College of Law flexibility should it no longer be possible for us to use your gift as you originally intended:

If, in the judgment of the Board of Trustees of Monterey College of Law, it shall become impossible for Monterey College of Law to use this bequest to accomplish the specific purposes of this bequest, Monterey College of Law may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.

## **Contact Us**

If you have any questions about how to make a bequest to Monterey College of Law, San Luis Obispo College of Law, and/or Kern County College of Law or to request any additional information that might be helpful to you and your advisors as you consider making a bequest to us, please email [dhowitt@montereylaw.edu](mailto:dhowitt@montereylaw.edu).

If you have included a bequest for Monterey College of Law, San Luis Obispo College of Law, and/or Kern County College of Law in your estate plan, please contact us to let us know. **We would like to thank you and recognize you for your gift.**