

# Join the Friends of the Chula Vista Nature Center

# LEGACY SOCIETY

The Legacy Society is a group of Chula Vista Nature Center benefactors who have provided a bequest in their wills or who have made another type of estate gift to support the work of the Nature Center. There are no membership fees or minimum required gift amounts to join the Legacy Society. The size of the gift is at your discretion and will remain confidential.

By remembering the Friends of the Chula Vista Nature Center with a bequest in your will, you can have an impact on Nature Center exhibits and programs that go far beyond your lifetime. In addition, your bequest may qualify for an estate tax charitable deduction.

Through the Legacy Society, the Friends of the Chula Vista Nature Center accomplishes a two-fold purpose:

- To thank those who have made legacy gifts to the Friends of the Chula Vista Nature Center through wills, life insurance, and other gift vehicles
- To encourage others to consider making these same legacy gifts to the Friends of the Chula Vista Nature Center

The following types of gifts qualify the donor for membership in the Legacy Society:

## BEQUEST

Through a will or living trust, you may give the Friends of the Chula Vista Nature Center a specific dollar amount, a particular asset, or some portion of the residue of your estate after your other beneficiaries have been provided for.

## LIFE INSURANCE

By naming the Friends of the Chula Vista Nature Center as a beneficiary of a life insurance policy, you may be able to provide a larger charitable gift than you would otherwise feel capable of making.

## RETIREMENT ASSETS

You may provide for a future gift by leaving the Friends of the Chula Vista Nature Center all or a portion of your remaining retirement assets or by naming the Friends of the Chula Vista Nature Center as a beneficiary of your retirement plan(s).

If you have included the Friends of the Chula Vista Nature Center in your estate plans, please let us know. We value the opportunity to thank you and show our appreciation for your generosity in supporting the Friends of the Chula Vista Nature Center.

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For more information, please contact:

Roderick Reinhart, CFRE, Manager, Office of Fund Development, City of Chula Vista, (619) 691-5070

# Ways to Make a Gift to the Friends of the Chula Vista Nature Center THROUGH YOUR WILL

## GENERAL BEQUESTS

This is one of the most popular ways to make a gift. You simply leave the Friends of the Chula Vista Nature Center a specified dollar amount.

*I give the sum of \$\_\_\_\_\_ to the Friends of the Chula Vista Nature Center, a charitable corporation located in Chula Vista, California, for its general educational purposes.*

## SPECIFIC BEQUESTS

Here, you designate that the Friends of the Chula Vista Nature Center receive a specific asset from your estate. Stocks, bonds, mutual fund shares, real estate and personal property (such as works of art or antiques) can constitute a specific bequest.

*I give \_\_\_\_\_ (insert a description of the asset) to the Friends of the Chula Vista Nature Center, a charitable corporation located in Chula Vista, California, for its general educational purposes.*

## RESIDUARY BEQUESTS

You can specify that the residue or a percentage of the residue of your estate be paid to the Friends of the Chula Vista Nature Center after all debts, taxes, expenses, and all other bequests have been paid.

*I give the rest of the property I own at my death to the Friends of the Chula Vista Nature Center, a charitable corporation located in Chula Vista, California, to be used for its general educational purposes.*

## PERCENTAGE BEQUESTS

A bequest may also be expressed as a percentage of your estate or of the residuary of your estate.

*I give \_\_\_% of my estate to the Friends of the Chula Vista Nature Center, a charitable corporation located in Chula Vista, California, for its general educational purposes.*

## CONTINGENT BEQUESTS

In this case, you name the Friends of the Chula Vista Nature Center to receive all or some of your estate if your primary heirs predecease you.

*If \_\_\_\_\_ (insert the name of your heir) predeceases me or disclaims any interest in \_\_\_\_\_ (describe the asset or portion of your estate), I give such property to the Friends of the Chula Vista Nature Center, a charitable corporation located in Chula Vista, California, for its general educational purposes.*

## RESTRICTED BEQUESTS

You may wish to restrict your bequest to a specific purpose at the Chula Vista Nature Center (for example, to memorialize a family member or a colleague, or to support a particular program).

*I give \$\_\_\_\_\_ (insert dollar amount or asset) to the Friends of the Chula Vista Nature Center, a charitable corporation located in Chula Vista, California. This gift shall be held in a permanent endowment fund to be known as the \_\_\_\_\_ (insert your desired fund name), income only from which may be used to support \_\_\_\_\_ (insert tax-exempt purpose for which the gift is made).*

## CODICIL TO YOUR WILL

If you already have a will and wish to change a beneficiary or add a bequest to the Friends of the Chula Vista Nature Center, ask your lawyer to draft a codicil for you to sign. All provisions of your existing will shall be retained except those which are modified by the codicil.

## CHARITABLE TRUSTS BY WILL

If you set up a trust by will, your heirs will receive income from an asset during their lifetimes, and then at their deaths, the principal goes to the Friends of the Chula Vista Nature Center.

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The Friends of the Chula Vista Nature Center is an IRS-qualified 501(c)(3) charitable organization. Copies of our tax-exempt status letters are available upon request. The federal identification number is 33-0750177. For estate tax purposes, bequests, legacies, devises, or transfers to the Friends of the Chula Vista Nature Center are deductible as they accord with the provision of the Internal Revenue Code Section 2055(a) and related regulations.

# LEGACY SOCIETY FINANCIAL INFORMATION



The following information will be kept confidential. MAIL DIRECTLY TO:  
 Roderick Reinhart, Office of Fund Development, City of Chula Vista, 365 F Street, Chula Vista, CA 91910

CONFIDENTIAL   
 (Please print all information.)

Full name, including middle:  
 Mr./Mrs./Ms. \_\_\_\_\_

Full name of spouse or registered domestic partner, including middle:  
 Mr./Mrs./Ms. \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ E-Mail \_\_\_\_\_

Day phone (\_\_\_\_) \_\_\_\_\_ Evening phone (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

- I (we) accept your offer to become a member of the Friends of the Chula Vista Nature Center's Legacy Society.
- I understand that only Mr. Roderick Reinhart, will be compiling my (our) information for recording purposes and that my (our) privacy will be maintained as indicated below.
- You may use my (our) name(s) in publications and lists that recognize Legacy Society members.  
 NAME(S) TO APPEAR EXACTLY AS FOLLOWS (please print):  
 \_\_\_\_\_
- You may NOT use my (our) name(s) in publications & lists that recognize Legacy Society members.
- Special instructions & restrictions:  
 \_\_\_\_\_  
 \_\_\_\_\_

I (We) have made provision for the Friends of the Chula Vista Nature Center in my (our) estate plans as follows:

GIFT VEHICLE	ESTIMATED \$	REVOCABLE	IRREVOCABLE
Gift by Bequest			
•General Bequest			
•Specific Asset Bequest			
•Residuary Bequest			
•Percentage Bequest			
•Contingent Bequest			
•Restricted Bequest			
•Codicil			
•Charitable Trust By Will			
Life Insurance Beneficiary			
Retirement Plan Beneficiary			
Mutual Fund Beneficiary			

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

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