

Sample Will and Bequest Language

Specific dollar amount

"I, (your name) , give (or bequeath) the sum of \$_____ to PENINSULA SCHOOL LTD. of Menlo Park, California, to be added to said organization's general fund and administered as a part thereof."

Percentage of estate through will

"I, (your name) , give (or bequeath) _____ percent of my net estate to PENINSULA SCHOOL LTD. of Menlo Park, California, to be added to said organization's general fund and administered as a part thereof."

Percentage of estate through trust

"I, (your name) , give (or bequeath) _____ percent of my net trust estate to PENINSULA SCHOOL LTD. of Menlo Park, California, to be added to said organization's general fund and administered as a part thereof."

Residue (or remainder) of estate

"I, your name , give (or bequeath) the residue of my estate to PENINSULA SCHOOL LTD. of Menlo Park, California, to be added to said organization's general fund and administered as a part thereof."

Note: A residual gift is a gift of whatever remains in an estate (or trust) after payment of expenses, taxes, other gifts, etc. are made.

Shares of Stock through will

"I, your name , give (or bequeath) # shares of type of stock to PENINSULA SCHOOL LTD. of Menlo Park, California, to be added to said organization's general fund and administered as a part thereof."

Note: Please always indicate the exact number of shares of stock rather than simply say "ALL of my shares". This helps to ensure that Peninsula School receives a gift from your estate, even if the stock is sold after the will/trust is executed but prior to death of the donor.

Gift for specific purpose

If you are interested in designating your bequest towards a specific purpose at the school, please contact the Development Office in order to ensure that we will be able to use your gift as specified.

NOTE: Please be aware that the information and suggested wording presented here do not constitute legal, financial, or tax advice. Individuals considering planned gift options should contact their professional advisors for information pertaining to their specific financial and tax situations.