



Sonoma County Regional Parks Foundation Legacy Gift Tools

Preserve, enhance and protect our parks forever

A bequest to the Regional Parks Foundation is a powerful vehicle to help ensure that our parks continue to provide recreational, cultural, and outdoor education opportunities for the people of Sonoma County. Your bequest can be general or specific to a particular park or purpose.

If you would like to include Sonoma County Regional Parks in your will or trust, please use our full legal name:

SONOMA COUNTY
REGIONAL PARKS
FOUNDATION

The IRS recognizes the Foundation as a tax exempt 501(C)(3) nonprofit organization. Our federal tax ID number is 68-0421813.

2300 County Center Dr.
Suite 120A

Santa Rosa, CA 95403

Tel: 707.565.1830

Fax: 707.579.8247

Melissa.Kelley@sonoma-county.org

SAMPLE BEQUEST LANGUAGE

(Print and provide to your attorney or advisor.)

If not otherwise specified in your estate planning documents, all gifts to the Foundation will be unrestricted and used for current needs at Sonoma County Regional Parks. If you wish to direct your gift to a specific purpose or program, please contact Melissa Kelley, executive director of the Parks Foundation, to discuss your preferences before meeting with your attorney or advisor.

Percentage – Designates a percentage of your estate you wish left to the Foundation.

"I give, devise and bequeath to Sonoma County Regional Parks Foundation located at 2300 County Center Drive, Suite 120A, Santa Rosa, CA 95403 (tax identification number 68-0421813) or its successor in interest ___% of my estate."

Specific – Identifies a specific dollar amount or asset to be left to the Foundation.

"I give, devise and bequeath to Sonoma County Regional Parks Foundation located at 2300 County Center Drive, Suite 120A, Santa Rosa, CA 95403 (tax identification number 68-0421813) or its successor in interest, Choose:

- 1) The sum of \$_____."
- 2) _____ shares of stock in _____ Company.", or
- 3) my real property commonly known as _____."

Residual - Provides for any remaining estate assets to be distributed to the Foundation after other distributions are complete.

"I give, devise and bequeath to Sonoma County Regional Parks Foundation located at 2300 County Center Drive, Suite 120A, Santa Rosa, CA 95403 (tax identification number 68-0421813) or its successor in interest all the residue of my estate, including real personal property."

Please note that the Foundation is able to accept gifts of vehicles—such as cars, boats, motorcycles or motorhomes—for the benefit of county parks.

This information is not offered as legal or tax advice. You are urged to seek the advice of your tax advisor, attorney, and/or financial planner to make certain any gift you are considering is appropriate for your circumstances.