



YOSEMITE
CONSERVANCY.

SAMPLE BEQUEST LANGUAGE FOR YOUR WILL OR TRUST

A gift to Yosemite Conservancy through your will or living trust helps you ensure Yosemite's grandeur for the future. A bequest is easy to arrange in three simple parts, will not alter your current lifestyle in any way, and can be easily modified to address your changing needs. Below, find sample language to help you make a gift to benefit Yosemite.

1. NAME YOSEMITE CONSERVANCY AS A BENEFICIARY

Provide the name Yosemite Conservancy and our tax identification number:

I give and devise to Yosemite Conservancy (Tax ID #94-3058041), located in San Francisco, CA...

2. IDENTIFY WHAT YOU WISH TO GIVE TO BENEFIT YOSEMITE CONSERVANCY

Yosemite Conservancy can accept cash, stocks, retirement funds, bank accounts and some forms of real property. If you wish to leave Yosemite Conservancy a specific item or property, please work with us in advance to ensure we can accept your gift.

Select the statement that best fits your needs:

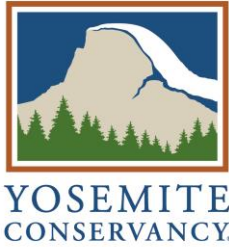
- _____ percent of my estate (provide a specific percentage)
- the sum of \$_____ (provide specific dollar amount)
- my _____ (list a specific asset)
- the remainder of my estate

3. INCLUDE WHAT YOU WOULD LIKE YOUR GIFT TO ACCOMPLISH

As the needs of Yosemite are ever-changing and unpredictable, if you wish to leave your gift for a specific purpose, please consult with Yosemite Conservancy prior to finalizing your documents to complete a Gift Agreement that ensures your gift can be used as intended.

...to be used for its general support.

...to be used for the support of (a specific fund or program).



CONTINGENT GIFT LANGUAGE

Yosemite Conservancy can be named as a contingent beneficiary in your will or living trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Yosemite Conservancy (Tax ID #94-3058041), located in San Francisco, CA, the sum of \$ _____ (or all, or a percentage, or the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

RETIREMENT PLAN BENEFICIARY LANGUAGE

Naming Yosemite Conservancy as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan allows your hard-earned savings to avoid taxes and be put to their fullest use to benefit Yosemite National Park and is easy to do.

1. Simply request a change-of-beneficiary form from your plan administrator.
2. List Yosemite Conservancy as a non-profit organization beneficiary using the Tax ID #94-3058041.
3. When you have finished, please return the form to your plan administrator and notify Yosemite Conservancy.

OTHER CONSIDERATIONS:

Every individual has unique needs and goals. Your legal, financial and/or tax professionals can advise you on which solution is best for your situation. We are not engaged in legal or tax advisory service and cannot provide legal or tax advice.

Contact us: legacy@yosemite.org

We look forward to speaking with you to answer your questions and learn about your Yosemite experience. If you've already made a giving plan, please let us know, so we can thank you and welcome you to the Legacy Society, a very special group of Yosemite benefactors.

Visit yosemite.org for more information about Yosemite Conservancy and ways you can support Yosemite National Park.