

Sample Bequest Language

The following language is to aid you and your attorney in preparing your bequest to the **Oregon-California Trails Association**.

I give, devise and bequeath to the Oregon-California Trails Association, an Independence, MO, nonprofit corporation organized in accordance with the laws of the State of Colorado, for the purpose of supporting its efforts to preserve overland trails,

- a) the sum of \$ _____ ;
- b) the following described property _____ ;
- c) (_____ % of) the rest, residue and remainder of my estate;

Outright Bequest

This bequest shall be used to further the purposes of the Oregon-California Trails Association in its trails preservation efforts, without restriction.

Designated Bequest

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Oregon-California Trails Association, but the gift shall be designated for use within the terms of the following specific endowment fund:

Bequest To Establish A New Permanent Endowment Fund

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Oregon-California Trails Association, but the gift shall be entered in the Association's books and records as the _____ Endowment Fund, and shall always be so designated.

The distributions from the fund shall be used for the follow purposes:

If you select a specific purpose for your gift, inclusion of the following sentence will ensure that the bequest remains useful if circumstances change in the future:

If, in the judgment of the OCTA Board of Directors, changed circumstances should, at some future time, render the designated use of this fund impracticable, unwise or inappropriate, then the Board shall use the fund to further the objectives and purposes of the Oregon-California Trails Association, giving consideration to my special interest as described above.

If you choose to name the Oregon-California Trails Association as a beneficiary, please let us know of your plans.

This will enable us not only to show our appreciation of your generosity, but also to include your support in planning for the future of the trails.