

## Sample Text for Wills and Trusts

### Language for Wills

You may add a simple codicil to your will to create a bequest for First Church. You can make a specific bequest by identifying a specific parcel of real estate, block of stock, or other clearly identified item. Or, you can make a cash bequest in a specific amount or as a percentage of your estate. You can also make a residual bequest from the remaining assets in your estate after all other specific bequests and settlement costs are satisfied. Your bequest can be undesignated and thus available for current use or designated to one of the endowments, which exist in perpetuity and generate an annual income. The following sample language can be used to fulfill your charitable objectives:

**Specific Amount:** I give, devise and bequeath \$ \_\_\_\_\_ to the \_\_\_\_\_ (please specify an endowment or leave blank to leave it undesignated) First Unitarian-Universalist Church of San Diego.

**Percentage Bequest:** I give, devise and bequeath \_\_\_\_\_ % of my gross estate to the \_\_\_\_\_ (please specify an endowment or leave blank to leave it undesignated) First Unitarian-Universalist Church of San Diego.

**Residuary Bequest:** I give, devise and bequeath the rest, residue and remainder of my estate to the \_\_\_\_\_ (please specify an endowment or leave blank to leave it undesignated) First Unitarian-Universalist Church of San Diego.

### Language for Trusts

You may amend your trust to create a bequest for First Church. (This can be done separately or, most often, is done as part of a review and re-wording of the Trust, which is recommended very 5-10 years as the relevant laws change.) You can make a specific bequest by identifying a specific parcel of real estate, block of stock, or other clearly identified item. Or, you can make a cash bequest in a specific amount or as a percentage of your estate. You can also make a residual bequest from the remaining assets in your estate after all other specific bequests and settlement costs are satisfied. Your bequest can be undesignated for current use and thus available for current use or designated to one of the endowments, which exist in perpetuity and generate an annual income. The following sample language can be used to fulfill your charitable objectives:

**Specific Amount:** The Trustee shall distribute \$ \_\_\_\_\_ to the \_\_\_\_\_ (please specify an endowment or leave blank to leave it undesignated) First Unitarian-Universalist Church of San Diego.

**Percentage Bequest:** The Trustee shall distribute \_\_\_\_\_ % of my gross estate to the \_\_\_\_\_ (please specify an endowment or leave blank to leave it undesignated) First Unitarian-Universalist Church of San Diego.

**Residuary Bequest:** The Trustee shall distribute the rest, residue and remainder of my estate to the \_\_\_\_\_ (please specify an endowment or leave blank to leave it undesignated) First Unitarian-Universalist Church of San Diego.