



ESTATE PLANNING INSTRUCTIONS

Please remember California Environmental Voters (EnviroVoters) and/or California Environmental Voters Education Fund as you plan the details of your estate.

California Environmental Voters, 501(c)(4) entity, exists to build the political will and power to solve the climate crisis, use climate action to advance justice, and create a global roadmap to protect our water, land, air, and most vulnerable communities.

California Environmental Voters Education Fund, EnviroVoters's 501(c)3 sister organization, protects California's natural resources and improves the health of our communities through public opinion research, organizing with allies and local communities, and educating legislators and the public on the most pressing environmental issues of our day.

The Legacy Society honors and appreciates those friends who have created a bequest or planned gift. Anyone who notifies us that they have named California Environmental Voters (EnviroVoters) and/or California Environmental Voters Education Fund as a beneficiary of a bequest or planned gift will be enrolled as a valued member. Members of the Legacy Society are invited to select events. Naming opportunities may be available dependent on the size and scope of the planned gift.

To discuss your specific wishes for your legacy gift, or if you would like assistance in structuring a gift, please contact:

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Please see the following page for sample language to use when writing your will/trust.

SAMPLE LANGUAGE

If you would like to leave a general bequest:

General bequests are legacies left to causes that come from the general value of the estate, and are made by designating a specific dollar amount, a particular asset, or a fixed percentage of your estate to the cause of your choice.

<p><u>California Environmental Voters</u> <i>I hereby give and bequeath to California Environmental Voters, a tax-exempt, not-for-profit 501(c)(4) organization whose headquarters are located in Oakland, CA with federal tax identification number 94-3169564. [the sum of \$_____ dollars.] or [____% of my residual estate.]</i></p>	<p><u>California Environmental Voters Education Fund</u> <i>I hereby give and bequeath to California Environmental Voters Education Fund, a not-for-profit institution whose headquarters are located in Oakland, CA with federal tax identification number 94-3232552. [the sum of \$_____ dollars.] or [____% of my residual estate.]</i></p>
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If leaving a gift of real estate:

<p><u>California Environmental Voters</u> <i>I hereby bequeath to California Environmental Voters, a tax-exempt, not-for-profit 501(c)(4) organization whose headquarters are located in Oakland, CA with federal tax identification number 94-3169564 real property located at _____ together with _____ all buildings and improvements located thereon and all insurance policies relating thereto.</i></p>	<p><u>California Environmental Voters Education Fund</u> <i>I hereby bequeath to California Environmental Voters Education Fund, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Oakland, CA with federal tax identification number 94-3232552 real property located at _____ together with all _____ buildings and improvements located thereon and all insurance policies relating thereto.</i></p>
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If leaving your entire estate:

<p><u>California Environmental Voters</u> <i>I bequeath my entire estate to California Environmental Voters, a tax-exempt, not-for-profit 501(c)(4) organization whose headquarters are located in Oakland, CA with federal tax identification number 94-3169564.</i></p>	<p><u>California Environmental Voters Education Fund</u> <i>I bequeath my entire estate to California Environmental Voters Education Fund, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Oakland, CA with federal tax identification number 94-3232552.</i></p>
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The information on this website/document is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. State law may further impact your individual results.

If you want to leave a donation in the event that the party you originally intended the gift for predeceases you (contingent beneficiary):

<p><u>California Environmental Voters</u> <i>If any of the foregoing bequests shall lapse, then I bequeath to California Environmental Voters, a tax-exempt, not-for-profit 501(c)(4) organization whose headquarters are located in Oakland, CA with federal tax identification number 94-3169564 such bequests as to which an ineffective disposition was made.</i></p>	<p><u>California Environmental Voters Education Fund</u> <i>If any of the foregoing bequests shall lapse, then I bequeath to California Environmental Voters Education Fund, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Oakland, CA with federal tax identification number 94-3232552 such bequests as to which an ineffective disposition was made.</i></p>
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If you want to leave parts of your estate to others and the remainder to charity (residuary legatee):

<p><u>California Environmental Voters</u> <i>All the rest, residue, and remainder of my estate, both real and personal, wherever located, I devise and bequeath to California Environmental Voters, a tax-exempt, not-for-profit 501(c)(4) organization whose headquarters are located in Oakland, CA with federal tax identification number 94-3169564.</i></p>	<p><u>California Environmental Voters Education Fund</u> <i>All the rest, residue, and remainder of my estate, both real and personal, wherever located, I devise and bequeath to California Environmental Voters Education Fund, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Oakland, CA with federal tax identification number 94-3232552.</i></p>
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If you want to leave assets to an individual (such as a partner or child) for use during their lifetime, but direct it to California Environmental Voters / California Environmental Voters Education Fund upon his or her death:

In this case, a more sophisticated vehicle, such as a charitable trust or pour-over trust, may be most effective. Please discuss this with your estate planner.

The information on this website/document is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. State law may further impact your individual results.