



# Bequests Through a Will or Trust

An excellent way to support Tanager in perpetuity and leave a lasting legacy is to leave us a bequest in your Will or Trust, living trust or with a codicil. You can bequest a specific asset, dollar amount, a percentage of your overall estate, or a percent of residue after other specific bequests have been fulfilled. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes, resulting in a larger inheritance for your heirs.

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to Tanager Place Endowment Foundation in your estate plan. We have provided some basic bequest language to assist you and your attorney.

## Specific Bequest

### **Bequest of a Specific Dollar Amount**

I hereby give, devise and bequeath \_\_\_\_\_ and No/100 dollars (\$DOLLARS) to Tanager Place Endowment Foundation, a nonprofit organization located at 2309 C St. SW, Cedar Rapids, IA, 52404, Federal Tax ID #42-1278189, for Tanager Place Endowment Foundation's general use and purpose.

### **Bequest of Specific Personal Property**

I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to Tanager Place Endowment Foundation, a nonprofit organization located at 2309 C St. SW, Cedar Rapids, IA, 52404, Federal Tax ID #42-1278189, for Tanager Place Endowment Foundation's general use and purpose.

### **Bequest of Specific Real Estate**

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to Tanager Place Endowment Foundation, a nonprofit organization located at 2309 C St. SW, Cedar Rapids, IA, 52404, Federal Tax ID #42-1278189, for Tanager Place Endowment Foundation's general use and purpose.

## Percentage Bequest

I hereby give, devise and bequeath \_\_\_\_\_ percent (\_\_\_\_%) of my total estate, determined as of the date of my death, to Tanager Place Endowment Foundation, a nonprofit organization located at 2309 C St. SW, Cedar Rapids, IA, 52404, Federal Tax ID #42-1278189, for Tanager Place Endowment Foundation's general use and purpose.



# Bequests, Cont'd

## Residual Bequest

*I hereby give, devise and bequeath to Tanager Place Endowment Foundation, a nonprofit organization located at 2309 C St. SW, Cedar Rapids, IA, 52404, Federal Tax ID #42-1278189, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for Tanager Place Endowment Foundation's general use and purpose.*

## Contingent Bequest

*If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to Tanager Place Endowment Foundation, a nonprofit organization located at 2309 C St. SW, Cedar Rapids, IA, 52404, Federal Tax ID #42-1278189, DESCRIPTION OF PROPERTY to be used for Tanager Place Endowment Foundation's general use and purpose.*

## Restricted Bequest

If you are considering a bequest but would like to ensure that your bequest will be used for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give and meet your charitable objectives. We will also work with you and your attorney to craft language to accomplish your goals.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give Tanager Place Endowment Foundation flexibility should it no longer be possible for Tanager Place Endowment Foundation to use your gift as you originally intended:

*If, in the judgment of the Board of Directors of Tanager Place Endowment Foundation, it shall become impossible for Tanager Place Endowment Foundation to use this bequest to accomplish the specific purposes of this bequest, Tanager Place Endowment Foundation may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.*

This information is not intended as legal or tax advice. Please consult your professional advisors before making a gift

Please visit [www.tanagerplace.org/donate](http://www.tanagerplace.org/donate) for more information on all ways to give, or  
contact the Tanager Philanthropy team at:  
(319) 365-9164 or [philanthropy@tanagerplace.org](mailto:philanthropy@tanagerplace.org).