



SAMPLE BEQUEST LANGUAGE and FORMS of BEQUEST

If you should wish to include the Monterey Public Library Friends and Foundation in your estate plans, you will want to use our correct and legal name, address, and Federal Tax Identification Number in your final documents. They are as follows:

Monterey Public Library Friends and Foundation
625 Pacific Street
Monterey, California 93940
Federal Tax Identification Number: 91-1976593

Forms of Bequest

- Specific sum of money: “I give to The Monterey Public Library Friends and Foundation the sum of [exact dollar amount].”
- Specific property such as real estate, stocks, bonds, works of art, or other items: “I give to The Monterey Public Library Friends and Foundation [description of the particular property].”
- Residue of estate after paying debts, taxes, expenses, and other bequests: “I give to The Monterey Public Library Friends and Foundation all [or a stated percentage] of the residue of my estate.”

Forms of Distributions from Living Trusts

Use the language above, but substitute “The Trustee shall distribute” for “I give” in the three examples.

Bequests for Restricted Purposes

Please telephone or email Mary Jane Perna, Interim Fund Development Officer, at (831) 646-5632 or perna@monterey.org to confirm that the Friends and Foundation of the Monterey Public Library can fulfill your intentions.

All donations are tax-deductible as allowed by law. The Monterey Public Library Friends and Foundation is a 501(c)(3) nonprofit organization. Tax ID is #91-1976593.