



## CALIFORNIA WILDLIFE FOUNDATION

*California Wildlife Foundation/California Oaks, 201 University Avenue, Berth H-43 Berkeley, CA 94710, (510) 763-0282*

### **GIFT AND ESTATE PLANNING**

Planned gifts to California Wildlife Foundation/California Oaks provide an opportunity to advance your financial and philanthropic goals. A planned gift enhances the financial viability of California Wildlife Foundation/California Oaks while supporting the protection of California's oak ecosystems.

Planned giving opportunities are summarized below. Be sure to consult with your financial and legal advisors when making these arrangements.

**Wills and Living Trusts:** Consider including California Wildlife Foundation/California Oaks in your estate planning through a bequest in your will or living trust designating a gift to California Wildlife Foundation/California Oaks. The gift can be for a specific amount, a percentage of your estate, or it can be contingent on certain events.

**Charitable Trusts:** There are a number of charitable trust vehicles, such as charitable remainder trusts and charitable lead trusts, which allow you to name California Wildlife Foundation/California Oaks as a charitable beneficiary.

**Life Insurance Policies:** Consider naming California Wildlife Foundation/California Oaks as a beneficiary of a life insurance policy. You can accomplish this by updating your beneficiary designation for an existing policy, designating California Wildlife Foundation/California Oaks as the beneficiary for a percentage or specific amount. You can also make an outright gift of a policy, naming California Wildlife Foundation/California Oaks as owner and beneficiary of an existing policy. If you continue to pay premiums on the policy, each payment is tax deductible as a charitable gift. You can also take out a new policy and irrevocably name California Wildlife Foundation/California Oaks as the owner and the beneficiary of the insurance contract. Under this scenario each payment is deductible as a charitable gift, whether you make one single premium payment for the policy or pay annual premiums.

**Bank and Brokerage Accounts:** A percentage or specified amount in a savings account can be designated as payable upon death to California Wildlife Foundation/California Oaks. Similarly, a percentage of a brokerage account can receive a transfer on death designation for California Wildlife Foundation/California Oaks.

For more information, please contact California Oaks Manager Angela Moskow: 510-763-0282.

*California Wildlife Foundation Federal Tax Identification number: 68-0234744*