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.

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