



*Preserving the Nature of Lummi Island*

**Bequest Information**

**Thank you for your interest in including the Lummi Island Heritage Trust in your estate plan. Please complete the following information and return to us at P.O. Box 158, Lummi Island, WA 98262, or email to [becca@liht.org](mailto:becca@liht.org).**

- I have included the Lummi Island Heritage Trust in my estate plan.. You may list my name in the Trust's publications to inspire others.
- I have included the Lummi Island Heritage Trust in my estate plan, but I wish to remain anonymous.
- I would like to learn more about how to include the Lummi Island Heritage Trust in my estate plan. *All inquiries are confidential and at no obligation.*

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E-mail \_\_\_\_\_ Phone (day) \_\_\_\_\_ (evening) \_\_\_\_\_

**Bequests – helpful tips and sample language**

**Bequeathing an IRA, 401k, or life insurance policy:**

- It is not necessary to go through the expense and time of changing your will.
- Every IRA account will contain a beneficiary designation form indicating the beneficiary(s) for the account. Simply changing the beneficiary on the IRA account will supersede your will. We can provide sample beneficiary forms if you prefer.
- This holds true for any non-probate asset such as annuities, life insurance, and retirement plans.

By bequeathing all or part of your tax-deferred IRA to charity, your family avoids receiving an asset that comes with a tax liability.

**Sample language for your will:**

I give and bequeath to the Lummi Island Heritage Trust, a Washington nonprofit corporation, with it's office presently located at 3560 Sunrise Road, P.O Box 158, Lummi Island, WA, 98262, or to its successors in interest, the sum of \_\_\_\_\_ and no/100 dollars (\$\_\_\_\_\_.00) (or a percentage of the estate, or the "residual" or remaining assets after all other bequests are filled.)