



Sample Charitable Bequest Information & Language

Our legal name: Peak Vista Community Health Centers Foundation
Our address: 3205 N Academy Blvd, Suite 130 | Colorado Springs, CO | 80917
Our IRS tax identification number: 20-3640104
We are a tax-exempt charitable institution listed in the Federal Internal Revenue Service Publication 78, "Cumulative List of Organizations," under IRS Code Section 501(c)(3).

Sample Language for a Bequest

This language is for illustrative purposes only and shows various forms of bequests. Always consult your professional advisor when making or revising your will.

GENERAL BEQUEST

I give, devise, and bequeath \$_____ to Peak Vista Community Health Centers Foundation, a Colorado nonprofit organization located in Colorado Springs, Colorado, Tax ID 20-3640104, to be used for its general charitable purposes.

PERCENTAGE BEQUEST

I give, devise, and bequeath _____% of my estate to Peak Vista Community Health Centers Foundation, located in Colorado Springs, Colorado, Tax ID 20-3640104, to be used for its general charitable purposes.

RESIDUARY BEQUEST

"Residue" is a term used to describe the portion of your estate that remains after all debts, expenses, and specific bequests to others have first been fulfilled.

All the rest, residue, and remainder of my estate I give to Peak Vista Community Health Centers Foundation, located in Colorado Springs, Colorado, Tax ID 20-3640104, to be used for its general charitable purposes.

SPECIFIC BEQUEST

I give to Peak Vista Community Health Centers Foundation, located in Colorado Springs, Colorado, Tax ID 20-3640104, the sum of \$_____, to be used for its general charitable purposes.

DONATION OF REAL ESTATE BY WILL

I leave Peak Vista Community Health Centers Foundation, located in Colorado Springs, Colorado, Tax ID 20-3640104, the real estate property described as follows: (property description).

I direct my Executor/Personal Representative to sell the above-described real estate property and distribute the proceeds to Peak Vista Community Health Centers Foundation, located in Colorado Springs, Colorado, Tax ID 20-3640104, for its general purposes.

BENEFICIARY DESIGNATION: DONATIONS OF LIFE INSURANCE, IRA, DONOR-ADVISED FUNDS (DAF) OR OTHER PENSION/RETIREMENT PLANS

A will typically does not dispose of assets such as life insurance and pension plans, which usually pass by “beneficiary designation.” A beneficiary designation is a contract between you and your insurance company or pension plan administrator to transfer the asset at your death to the person(s) or institution(s) you have designated (usually in the initial paperwork you completed to establish the asset). To designate Peak Vista Community Health Centers Foundation as the beneficiary of such an asset, you should contact your insurance company or plan administrator and request a “change of beneficiary” form, which you can complete and return to them.

Note: Use Tax ID 20-3640104 in lieu of a Social Security number for an organization.

PAYABLE ON DEATH (POD) AND TRANSFER ON DEATH (TOD) DESIGNATIONS

By setting up a POD or TOD designation on your bank accounts, certificates of deposit, or brokerage accounts, you can transfer these assets at your death to the person(s) or charity(ies) that you name. To set up a POD or TOD designation, contact your bank or investment advisor to fill out their beneficiary designation forms.

If you designate Peak Vista Community Health Centers Foundation as the beneficiary of any of your plans or accounts, please use our legal name and Federal Tax ID 20-3640104 in lieu of a Social Security number for an organization.