



ENDOWMENT & ESTATE GIVING

We invite you to consider joining the IPSF Pillar Society. By making a planned gift, you join an esteemed group of people who provide lasting contributions to our work. Please let us know if you plan to or have already included IPSF in your will or estate. We would like to thank you for your generosity by including you in the Pillar Society.

SAMPLE TESTAMENTARY LANGUAGE

Bequest Language

For a specific percentage request: "I give X percent to [list beneficiaries], and Y percent to Irvine Public Schools Foundation, Tax ID# 33-0733191, located in Irvine, California for its Endowment Fund."

For a specific monetary bequest: I give and bequeath the sum of \$_____ to Irvine Public Schools Foundation, Tax ID# 33-0733191, located in Irvine, California.

For residuary bequest: I direct that the remainder of my estate, whether real property, personal or mixed and wheresoever situated, be distributed to Irvine Public Schools Foundation. My Executor shall, at the request of Irvine Public Schools Foundation, liquidate and sell any real estate or tangible personal property which is part of the residue of my estate before making distribution.

Non-Testamentary Language for Designation of Beneficiary

Donors may wish to designate a charity or fund as the beneficiary of assets such as life insurance, stock accounts and IRAs. This allows the donor to have complete control of his or her assets during the donor's lifetime. At the donor's death, the asset passes without probate to the beneficiary designated. In order to designate a beneficiary, the donor should contact the custodian of the asset and request a beneficiary designation form. The fund may be designated as either primary or as contingent beneficiary.

To find out more about the impact of making an estate or endowment gift, or to inform us of your existing plans, please contact Executive Vice President Keegan Bell at kbell@ispf.net or 949.265.6415.