



Making a Gift from a Will or Trust

Benefits

- Your assets remain in your control during your lifetime.
- Your current expenses will not be impacted.
- You can modify your gift to address changing circumstances.
- You can make a positive impact beyond your lifetime.

Need a Will?

If you don't yet have a will, you're not alone—and it's easier than you might think to get started. [FreeWill.com](https://www.freewill.com) offers a free, secure way to create a legal will in about 20 minutes. You can use it to plan for your loved ones and include a legacy gift to the Sacramento Dharma Center (SDC) if you choose.

Examples of Gift Language for your Will or Trust

- **Gift of a Specific Amount:**

"I give to the Sacramento Dharma Center (Tax ID# 45-5199338) the sum of \$___ to be used for its general support."

- **Gift of a Portion/Percentage of your estate:**

"I give to the Sacramento Dharma Center (Tax ID# 45-5199338) ___% of my estate to be used for its general support."

- **Contingent Bequest:** SDC can be named as a contingent beneficiary in your will or trust if one or more of your specific bequests cannot be fulfilled.

"If (insert name) is not living at the time of my death, I give to Sacramento Dharma Center (Tax ID# 45-5199338) the sum of \$ _____ (or a % of the residue of my estate) to be used for its general support."

- **Residual Bequest:** A residual bequest comes to SDC after all your estate expenses and specific bequests are paid:

"I give to the Sacramento Dharma Center (Tax ID# 45-5199338) the rest and residue of my estate to be used for its general support."

The information on this handout is for educational purposes only and is not intended as legal or tax advice. For such advice, please consult a lawyer, financial advisor, or tax specialist.

Sacramento Dharma Center
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