



DEATH VALLEY '49ers

INCORPORATED

Promote Understanding and Appreciation
of Death Valley and its History

Beneficiary Designations

Bequests to Death Valley '49ers Incorporated General Funding and/or provide scholarship assistance to deserving students and/or support the National Parks Service Education Programs.

By providing for the Death Valley '49ers Incorporated in your will or living trust, your assets are not diminished during your lifetime and taxes owed by your estate may be reduced by the amount of the gift.

Bequests may be:

- A specific dollar amount
- A percentage of your estate
- The residual of your estate
- A contingent bequest

Will Wording and Beneficiary Designations

Sample language to help you define and execute your charitable intentions for making gifts by will, trust, or beneficiary designation to the Death Valley '49ers is provided below. Share this information with your estate planning attorney.

The Federal Identification Number for Death Valley '49ers is 23-7087095.

Gifts may be general or have specific designation:

DV '49er General Fund

DV '49er Scholarship Endowment Fund

DV '49er NPS Education Programs

Curatorial Intern Program

Outreach Program "Rocks"

Roadside Monuments

General Bequest

I give and devise to the Death Valley '49ers , Death Valley, California (EIN 23-7087095), a nonprofit corporation organized under the laws of the State of California, all (or the percentage of _____%), of the rest, residue and remainder of my estate, both real and personal, to be used at the discretion of its governing board.

I instruct that all my charitable gifts shall be made, to the extent possible, from property that constitutes "income in respect of a decedent" as that term is defined in the Internal Revenue Code.

Contingent Bequest

If (insert name) does not survive me, then and in that event, I give and bequeath to the Death Valley '49ers, Death Valley, California, (EIN 23-7087095), a nonprofit corporation organized under the laws of the State of California, all of the rest, residue and remainder of my estate, both real and personal, to be used at the discretion of its governing board.

I instruct that all my charitable gifts shall be made, to the extent possible, from property that constitutes "income in respect of a decedent" as that term is defined in the Internal Revenue Code.

Specific Bequest – Money

I give and bequeath to the Death Valley '49ers, Death Valley, California, (EIN 23-7087095), a nonprofit corporation organized under the laws of the State of California, the sum of \$_____ (or specified percentage of ___%), to be used at the discretion of its governing board (or according to the Memo of Understanding on file with said organization).

I instruct that all my charitable gifts shall be made, to the extent possible, from property that constitutes "income in respect of a decedent" as that term is defined in the Internal Revenue Code.

Specific Bequest - Securities

I give and bequeath to the Death Valley '49ers, Death Valley, California, (EIN 23-7087095), a nonprofit corporation organized under the laws of the State of California, the following described securities or other personal property _____, to be used at the discretion of its governing board (or according to the Memo of Understanding on file with said organization).

Specific Bequest – Real Estate

I give and bequeath to the Death Valley '49ers, Death Valley, California, (EIN 23-7087095), a nonprofit corporation organized under the laws of the State of California, the following described real property _____, situated in _____ County, State of _____, to use said property and the rents, income or proceeds arising there from or the proceeds of the sale thereof, to be used at the discretion of its governing board (or according to the Memo of Understanding on file with said organization).

Beneficiary Designation – Retirement Plan Assets

It may be easier than you realize to donate your retirement plan assets to charity and an effective way to reduce income and/or estate taxes. Options available to provide significant financial support to Death Valley '49ers with your retirement plan assets (401k, 403b, IRAs) include:

- Name Death Valley '49ers, Death Valley, California (EIN 23-7087095) as the primary beneficiary of all (or part) of the plan assets remaining after your lifetime;
- Name Death Valley '49ers, Death Valley, California (EIN 23-7087095) at the death of your spouse; or
- Name Death Valley '49ers, Death Valley, California (EIN 23-7087095) as the contingent beneficiary;

Request a change of beneficiary form at your place of employment or the financial institution managing your account. Update the beneficiary designation form with the new beneficiary or beneficiaries; return the form to your plan sponsor and notify Death Valley '49ers of your intent.

Beneficiary Designation - Life Insurance

Death Valley '49ers, Death Valley, California, (EIN 23-7087095), may be designated as the beneficiary on life insurance and annuity contracts.