

# To Include Collaboratory in Your Estate Planning

Thank you for thinking of Collaboratory as you think about your own legacy and the difference you want your legacy to make. Your attorney should help you include a bequest to Collaboratory in your estate plan. But here are some traditional options to help you think about a direction.

- 1. You can bequest a specific dollar amount. For that, the language would read something like this:**

"I hereby give, devise and bequeath \_\_\_\_\_ and No/100 dollars (\$DOLLARS) to Southwest Florida Community Foundation, Inc., DBA Collaboratory ("Collaboratory"), a nonprofit organization located at 2031 Jackson Street, Fort Myers, FL 33901, Federal Tax ID #59-6580974, for Collaboratory's general use and purpose."

- 2. You can bequest a specific piece of property with language like this:**

"I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to Southwest Florida Community Foundation, Inc., DBA Collaboratory ("Collaboratory"), a nonprofit organization located at 2031 Jackson Street, Fort Myers, FL 33901, Federal Tax ID #59-6580974, for Collaboratory's general use and purpose."

- 3. You can make a bequest of a percentage of your overall estate with language like this:**

"I hereby give, devise and bequeath \_\_\_\_ percent (\_\_\_\_%) of my estate's net value, determined as of the date of my death, to Southwest Florida Community Foundation, Inc., DBA Collaboratory ("Collaboratory"), a nonprofit organization located at 2031 Jackson Street, Fort Myers, FL 33901, Federal Tax ID #59-6580974, Collaboratory's general use and purpose."

**4. You can bequest assets that are left over—residual assets—after you have satisfied your biggest priorities, with language like this:**

"I hereby give, devise and bequeath to Southwest Florida Community Foundation, Inc., DBA Collaboratory ("Collaboratory"), a nonprofit organization located at 2031 Jackson Street, Fort Myers, FL 33901, Federal Tax ID #59-6580974, ALL OR A PERCENTAGE of the rest, residue, and remainder of my estate to be used for Collaboratory's general use and purpose. "

"If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to Southwest Florida Community Foundation, Inc., DBA Collaboratory ("Collaboratory"), a nonprofit organization located at 2031 Jackson Street, Fort Myers, FL 33901, Federal Tax ID #59-6580974, DESCRIPTION OF PROPERTY to be used for Collaboratory's general use and purpose."

Speak to your attorney, and then let's connect to discuss next steps.