



Chelan-Douglas Land Trust  
**Bequest Information**

Thank you for your interest in including the Chelan-Douglas Land Trust in your estate plan. Please complete the following information and return to us at CDLT, PO Box 4461, Wenatchee, WA 98807, or email to sharon@cdlandtrust.org.

- I have included the Chelan-Douglas Land Trust in my estate plan. You may list my name in Land Trust publications to inspire others.
- I have included the Chelan-Douglas Land Trust in my estate plan , but I wish to remain anonymous.
- I would like to learn more about how to include the Chelan-Douglas Land Trust in my estate plan. *All inquiries are confidential and at no obligation.*

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E-mail \_\_\_\_\_ Phone (day) \_\_\_\_\_ (evening) \_\_\_\_\_

**Bequests – helpful tips and sample language**

**Bequeathing an IRA, 401k, or life insurance policy:**

- It is not necessary to go through the expense and time of changing your will.
- Every IRA account will contain a beneficiary designation form indicating the beneficiary(s) for the account. Simply changing the beneficiary on the IRA account will supersede your will. We can provide sample beneficiary forms if you prefer.
- This holds true for any non-probate asset such as annuities, life insurance, and retirement plans. By bequeathing all or part your tax-deferred IRA to charity, your family avoids receiving an asset that comes with a tax liability.

**Sample language for your will:**

I give and bequeath to the CHELAN-DOUGLAS LAND TRUST, a Washington nonprofit corporation, with its office presently located at 18 N. Wenatchee Avenue, P. O. Box 4461, Wenatchee, Washington, or to its successors in interest, the sum of \_\_\_\_\_ and No/100 Dollars (\$\_\_\_\_\_.00)  
(Or a percentage of the estate, or the “residual” or remaining assets after all other bequests are filled.)

*Please note that the Chelan-Douglas Land Trust can not render legal or tax advice. Please consult your professional advisor before making a charitable gift.*