



Bequest Language

A planned gift through your estate plans can help to secure the long-term financial viability of the Santa Barbara Education Foundation beyond the lifetimes of its founders and current supporters. The easiest planned gift is a simple bequest that names Santa Barbara Education Foundation as a beneficiary in your Will or Living Trust. When realized, your bequest will help to sustain a “legacy of education” for future generations.

A bequest can leave to Santa Barbara Education Foundation a fixed dollar amount, a percentage, or the residue of your estate. The amount you designate will pass to charity free of estate tax. Suggested language for your attorney to use follows:

Fixed Amount of Money or a Designated Property

“I give, devise, and bequeath to Santa Barbara Education Foundation, located at 1528 Chapala Street, Suite 308, Santa Barbara, California 93101, \$_____.” (Or describe the real or personal property, including exact location.)

Percentage of the Estate

“I give, devise and bequeath to Santa Barbara Education Foundation, located at 1528 Chapala Street, Suite 308, Santa Barbara, California 93101, _____% of my estate.”

Residual Bequest

“All the residue of my estate, including real and personal property, I give, devise and bequeath to Santa Barbara Education Foundation, located at 1528 Chapala Street, Suite 308, Santa Barbara, California 93101.”

Federal Tax Identification #: 77-0071544

For questions about this and other ways to give to Santa Barbara Education Foundation and its endowment fund, please contact Katie Szopa, Interim Executive Director at (805) 284-9125 or Katie@SantaBarbaraEducation.org.