



OUTWARD BOUND
CALIFORNIA

A gift to OBCA in your will or revocable trust enables you to support our mission and make a difference in the lives of future students for generations to come. A bequest:

- is easy to arrange.
- will not alter your current lifestyle in any way.
- can be easily modified to address your changing needs.

When creating your will or trust, please refer to our organization as:

Outward Bound California
548 Market Street, PMB 68876
San Francisco, CA 94014-5401

Tax ID#: 26-4206241

There are several different ways to include the OBCA as a beneficiary of your will or trust. Here are some examples of suggested language. Please feel free to adapt this language with your attorney to fit your individual situation.

RESIDUAL GIFT LANGUAGE

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Outward Bound California, located in San Francisco, California, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support.

SPECIFIC GIFT LANGUAGE

Naming OBCA as a beneficiary of a specific amount or percentage of your estate is easy:

I give and devise to Outward Bound California, located in San Francisco, California the sum of \$_____ (%) to be used for its general support.

CONTINGENT GIFT LANGUAGE

OBCA can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:



OUTWARD BOUND
CALIFORNIA

If (insert name) is not living at the time of my demise, I give and devise to Outward Bound California, located in San Francisco, CA, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support.

RETIREMENT PLAN BENEFICIARY LANGUAGE

You may name OBCA as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming OBCA as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming OBCA as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support OBCA free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. Then, enter OBCA (Tax ID#: 26-4206241) on the form with the percent you would like us to receive. When you have finished, please return the form to your plan administrator and notify OBCA. We can also assist you with the proper language for your beneficiary designation to OBCA.

CUSTOMIZED LANGUAGE

If you or your attorney would like OBCA to provide you with customized beneficiary language that is specific to your goal and interest, please email us at legacy@obca.org.