

Bequest Wordings For Northwest Trek

Northwest Trek Wildlife Park is pleased to provide the following suggested bequest wordings for your attorney to use in drawing up your will. Your attorney may help you determine which is right for you.

Regardless of the specific wording used, it is important to use the proper legal name and location. Northwest Trek conducts much of its fundraising in conjunction with Northwest Trek Foundation. Thus, your bequest for Trek should be made to “Northwest Trek Foundation, a Washington 501(c)(3) non-profit organization, for the benefit of Northwest Trek Wildlife Park.”

Unrestricted Bequest

I give to Northwest Trek Foundation, a Washington 501(c)(3) non-profit organization, for the benefit of Northwest Trek Wildlife Park [insert here the sum of money, percent portion of the estate, description of property, or “the rest, residue and remainder of my estate”] _____, which Northwest Trek may use for its general purposes and without other restrictions as to use.

Unrestricted Bequest For Endowment

I give to Northwest Trek Foundation, a Washington 501(c)(3) non-profit organization, for the benefit of Northwest Trek Wildlife Park [insert here the sum of money, percent portion of the estate, description of property, or “the rest, residue and remainder of my estate”] _____, which bequest shall be added to the permanent Northwest Trek Endowment Fund at Northwest Trek Foundation, of which the principal is kept intact and only the income and/or growth expended, this endowment to be administered in accordance with policies established by Northwest Trek Foundation, and the proceeds may be spent by Northwest Trek for its general purposes and without other restrictions as to use.

Restricted Bequest

[Please check with Northwest Trek on how to word restrictions so that your wishes will be carried out.]

I give to Northwest Trek Foundation, a Washington 501(c)(3) non-profit organization, for the benefit of Northwest Trek Wildlife Park [insert here the sum of money, percent portion of the estate, description of property, or “the rest, residue and remainder of my estate”] _____, to be used for [insert here the purpose for which the gift is to be used] _____. If in the future there is no longer a need for the funds so specified or it is unwise, in the judgment of the Board of Northwest Trek Foundation (in consultation with the staff of Northwest Trek Wildlife Park, if possible) to use the gift for the purposes specified above, then the Board may, in its discretion, use the gift to fulfill such other charitable objectives as it may designate, keeping in mind the objectives above set forth and keeping as close as possible to the original purpose.

[You may combine the wording for Unrestricted Bequests for Endowment with that for Restricted Bequests to make a Restricted Bequest for Endowment. If you establish a named endowment fund, you may also stipulate that the name will be retained if the purpose must be altered.]

Immediately following any of the above wordings, in order to reduce possible income taxes due on the estate, the attorney may add, “This gift shall be paid out of ‘income with respect of a decedent,’ as that term is defined in the Internal Revenue Code, to the fullest extent possible. If such ‘income with respect of a decedent’ as valued for U.S. tax purposes is insufficient to pay this bequest, then the bequest shall be paid to the extent necessary out of the general assets of my estate.”

Informing Northwest Trek Wildlife Park

Your thoughtful plans mean a great deal to Northwest Trek Wildlife Park. Such testamentary gifts will, over the years, provide a strong financial base to help us fulfill our mission in many ways. When you use the suggested wording or other wording recommended by your attorney to help Northwest Trek through a bequest, we hope you will notify both Trek and The Greater Tacoma Community Foundation so we may express our appreciation for your generosity and recognize it appropriately.

If you have questions, please contact Tyra Larson at (360) 832-7165 or email tyra.larson@nwtrek.org.