# Our Legacy is Our Gift to the Future

VOTE SOLAR



**We believe in a world where the sun brings power to us all, the air we breathe is clean, and everyone contributes directly to a stable climate.**

**Join Vote Solar in creating this world for future generations!**

The most frequently used and least complicated forms of planned/legacy giving are a bequest or beneficiary designation. They can easily be modified throughout your lifetime, and allow you to 1) provide for those dearest to you, and 2) make a meaningful gift to the causes closest to your heart. Below, please find more details on Bequests and Designations.

## Bequests: *Types and Sample Language*

**A bequest is money, personal property, or other assets left to a person or organization through a legal will. Below are three typical types of bequests.**

### ❶ Residuary Bequest

"Residue" is a term to describe the portion of your estate that remains after all debts, expenses and specific bequests to others have first been fulfilled.

*Sample language:*
"All the rest, residue and remainder of my estate I give to Vote Solar, Tax ID 46-4396728, for its general purposes."

### ❷ Specific Bequest

*Sample language:*
"I give to Vote Solar, Tax ID 46-4396728 the real property described as follows: [property description]."

### ❸ Donation of Real Estate by Will

*Sample language:*
"I direct my Executor/Personal Representative to sell the above-described real property and distribute the proceeds to Vote Solar, Tax ID 46-4396728, for its general purposes."

## Designations: *Types and Sample Language*

**Beneficiary designations include donations of Life Insurance, IRA, Donor Advised Funds (DAF), or Other Pension/Retirement Plans.**

A will does not typically dispose of assets such as **life insurance** and **pension plans**. Instead, these usually pass by **beneficiary designation**, a contract between you and your insurance company or pension plan administrator to transfer the asset at the time of your death to the person(s) or institution(s) you have designated (usually in the initial paperwork you completed to establish the asset).

### Payable on Death (POD) and Transfer on Death (TOD) Designations

By setting up a POD or TOD designation on your bank accounts, certificates of deposit or brokerage accounts, you can transfer these assets at your death to the person(s) or charity(-ies) that you name. To set up a POD or TOD designation, contact your bank or investment advisor to fill out their *beneficiary designation forms*.

*To designate Vote Solar as the beneficiary of such an asset, plan, or account, please contact your insurance company or plan administrator and request a change of beneficiary form, which you can complete and return to them.*

Key information for your bequest or designation*

**Legal Name:** Vote Solar | **Address:** 2443 Fillmore Street #380-1375, San Francisco, CA 94115
**IRS Tax Identification Number:** 46-4396728 (use in lieu of social security number for designations)
**Tax Status:** Tax-exempt, charitable institution listed in the Federal Internal Revenue Service Publication #78, "Cumulative List of Organizations," revised IRS Code 501(c)(3).

*Please note, Vote Solar does not provide legal or tax advice. This language is for the illustration of various forms of bequests only. Please consult your attorney, financial advisor, or tax professional to determine what is best for your individual circumstances and when making or revising your will, trust, or estate plans.

**For questions, or to let us know you've made a Legacy Gift, please contact us at philanthropy@votesolar.org**