



JOHN BALL ZOO

1300 W Fulton St. Grand Rapids, MI 49504

616-336-4300 Fax 616-336-3907

jbzoo.org

Sample Bequest Language

A well-planned gift communicates your legacy; it tells a story of what you hold as most important and valuable in your life and community. Leaving a gift to John Ball Zoo through your will or trust is an easy and impactful way to sustain the Zoo's work for wildlife. John Ball Zoo is the preferred designee for estate gifts.

The sample language provided below illustrates how a bequest can be accomplished and is intended to be used for educational purposes rather than as legal advice. We encourage donors to share this information with their legal counsel. We also recommend that you contact and review your bequest information with Amber Krieg, Major Gifts Director, at 616-336-4313 or akrieg@jbzoo.org to ensure that your plans will be carried out as you wish.

UNRESTRICTED GIFT | A gift that can be used where need or opportunity is greatest

I give to John Ball Zoo (tax ID# 38-60768), a nonprofit 501(c)(3) corporation, located in Grand Rapids, MI, the sum of \$ _____, * for its general purposes.

GIFT FOR A SPECIFIC PURPOSE | A gift for a specific program (For example, John Ball Zoo Animal Care, Education or Conservation)

I give to John Ball Zoo (tax ID# 38-60768), a nonprofit 501(c)(3) corporation, located in Grand Rapids, MI, the sum of \$ _____, * to be used for [state purpose]. In the event the purposes of the restriction, in the opinion of John Ball Zoo, can no longer be served, the Zoo may devote any remaining assets exclusively for charitable purposes that: (a) are within the scope of the charitable purposes of John Ball Zoo, and (b) most nearly approximate the original purpose of the gift.

In this example, a stated purpose could be: "to be used according to the Letter of Intent I have on file with John Ball Zoo."

PERPETUAL ENDOWMENT FUND | A gift that benefits the Zoo in perpetuity

I give to John Ball Zoo (tax ID# 38-60768), a nonprofit 501(c)(3) corporation, located in Grand Rapids, MI, the sum of \$ _____, to be used as a permanent endowment, the income only from which shall be used for its general purposes (or describe the specific purpose, if desired). **Minimum endowment level is \$25,000.**

*Rather than leaving a certain sum, you may include language that refers to a percentage of your estate or a description of the property you wish to give.

John Ball Zoo (tax ID # 38-60768) is a nonprofit 501(c)(3) corporation. This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.