

Bequests Fact Sheet



Bequests and Legacy Gifts

A bequest to the Puget Soundkeeper Alliance in your will or other element of your estate plan ensures that we will be able to continue to protect and preserve Puget Sound by monitoring, cleaning up and preventing pollution from entering its waters. Your gift keeps Puget Soundkeeper Alliance actively monitoring and engaging our community to mitigate current damage and protect Puget Sound for future generations.

Leave a Legacy for Puget Sound

Your legacy will support the Puget Soundkeeper Alliance's timeless mission to expand our reach throughout Puget Sound, and to improve citizen involvement through education and awareness. Your legacy gift will help us fight the increased risk of spills from unnecessary oil and coal transportation and export, the long term threats posed by ocean acidification and climate change and continue the fight against stormwater pollution.

Please see our suggested bequest language below for including Puget Soundkeeper Alliance in your will or trust.

Suggested Bequest Language

A bequest is the most common type of planned gift in America today, but it requires special language that must be included in a properly executed will or trust devised by your attorney. Our suggested language for an unrestricted bequest to Puget Soundkeeper Alliance is provided below.

If you wish to restrict how Puget Soundkeeper uses your gift, that language may also be included; please contact us for an amendable gift agreement that documents your intent. Below is language that we suggest using in your estate planning document(s).

Bequest of Specific Sum

"I give, devise, and bequeath to Puget Soundkeeper Alliance (tax identification number 91-1285783), a non-profit organization with its principal offices located in Seattle, Washington, \$__[include amount here]__, for its general uses and purposes."

Bequest of Specific Asset(s)

"I give, devise, and bequeath to Puget Soundkeeper Alliance (tax identification number 91-1285783), a non-profit organization with its principal offices located in Seattle, WA __[list asset(s) and/or description(s) here]__, for its general uses and purposes."

Percentage Bequest

"I give, devise, and bequeath to Puget Soundkeeper Alliance (tax identification number 91-1285783), a non-profit organization with its principal offices located in Seattle, WA, ____% of the rest and residue of my estate, for its general uses and purposes."

Residuary Bequest

"I give, devise, and bequeath to Puget Soundkeeper Alliance (tax identification number 91-1285783), a non-profit organization with its principal offices located in Seattle, WA, the rest and residue of my estate, for its general uses and purposes."

Contingent Bequest

"In the event that (name or names, i.e., spouse, children, sibling, heirs) shall not survive me, or shall die during the administration of my estate, within __ days from the date of my death, or as a result of a common disaster, then I give, devise, and bequeath those beneficiaries' shares of my estate to Puget Soundkeeper Alliance (tax identification number 91-1285783), a non-profit organization with its principal offices located in Seattle, WA for its general uses and purposes."

Special Considerations

Please contact us about restricting your bequest to the specific League program(s) of your choice.

Unrestricted contributions are preferred; however, we also welcome a conversation if funding a specific program is critical to you. We have many projects – both short-term and ongoing – at Puget Soundkeeper Alliance for which we seek support. We can tell you about all the available options today – and tomorrow, to care for animals well into the future. Gifts to Puget Soundkeeper Alliance may be made in memory of any deceased person(s) or pet(s) or in honor of any living person(s) or pet(s).

Other Types of Planned Gifts that May Interest and Benefit You

If you are considering a bequest, be aware that other gift types – such as an outright donation of real estate, a charitable remainder trust, or a retained life estate arrangement involving a personal residence – may be suitable or preferable, taking into account your goals and needs. Of course, arranging a gift for Puget Soundkeeper Alliance through some other element of an estate plan – e.g., including our organization as a beneficiary of a financial, retirement, or life insurance asset – is also an act of considerable generosity that many people can afford even if a large lifetime gift is not realistic.

Our development staff can help you plan the right gift in light of your assets, income, family, and other estate or financial obligations. You may be able to be a greater philanthropist than you realize. Would you consider making the gift of a lifetime to Puget Soundkeeper Alliance if we can show you how?

We Invite You to Contact Us

Puget Soundkeeper Alliance is a 501(c)(3) charity and our programs depend on your support.

Direct your confidential inquiries and notifications about legacy gifts for the benefit of Puget Soundkeeper Alliance to:

Teresa Nelson, Development Director
Puget Soundkeeper Alliance
130 Nickerson St, Suite 107
Seattle, WA 98109
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Information also available at pugetsoundkeeper.org/donate/ways-to-give/

This information provided by the Puget Soundkeeper Alliance is not financial, tax or legal advice. You should consult your advisors before making your charitable giving decisions.