

GIVING THROUGH YOUR WILL OR LIVING TRUST

A simple way to create a lasting legacy

A gift through your will or living trust, often called a bequest, is one of the most meaningful and flexible ways to support Venice Family Clinic. It allows you to make a significant future gift while retaining full control of your assets today.



WHY CONSIDER A BEQUEST?



- **Create lasting impact**

Direct your gift to support compassionate, high-quality care for individuals and families who need it most – today and for generations to come.



- **Maximize tax efficiency**

In some cases, a charitable bequest can reduce estate taxes. Certain assets, such as retirement accounts, may be more tax-efficient when left to charity rather than to individuals.



- **Maintain flexibility**

Your plans can evolve. You may update or revise your bequest at any time as your circumstances change.



- **Use a variety of assets**

Bequests can be funded with cash, securities, real estate, retirement assets, or other property – allowing you to design a plan that fits your goals.

BEQUEST LANGUAGE

Your estate planning team can use the following language in your will or trust or to make an amendment or add a codicil to your plans.

I, NAME give INSERT DESCRIPTION OF ASSET to Venice Family Clinic Foundation, a 501(c)3 nonprofit organization Tax ID 27-3484548, 604 Rose Ave., Venice, CA 90291 to be used for UNRESTRICTED SUPPORT OR NAME OF SPECIFIC PROGRAM.*

**If circumstances arise in the future that make the purpose of the gift impossible, impractical or obsolete, then the Board of Directors of Venice Family Clinic may authorize the reallocation of the gift to a purpose as near as possible to the intent of the original bequest.*

HOW IT WORKS

Including Venice Family Clinic in your estate plans is straightforward:

- Name Venice Family Clinic (or its supporting foundation, if applicable) in your will or trust and specify how your gift should be used. You may support a specific program or allow your gift to be directed where it is needed most.
- Add a simple amendment (codicil) to your will or update your revocable trust.
- Choose to give a specific amount, a percentage of your estate, or what remains after other distributions.
- Designate Venice Family Clinic as a beneficiary of a retirement account or life insurance policy by completing a beneficiary form with your plan or policy administrator.

LET US KNOW YOUR PLANS

If you have already included Venice Family Clinic in your estate plans – or are considering doing so – we would welcome the opportunity to speak with you.

Sharing your intentions allows us to:

- Ensure your gift is used exactly as you envision
- Provide sample bequest language for you and your advisors
- Recognize your generosity as part of our legacy giving community, if you wish



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venicefamilyclinic.org/create-a-legacy
Tax ID: 27-3484548