



Planning Your Legacy

When you include a gift to Save Mount Diablo in your will or other estate plan, you establish a living legacy and help provide a solid financial foundation for Save Mount Diablo's future. Your investment in Save Mount Diablo will help our organization continue to preserve Mount Diablo's peaks, surrounding foothills, watersheds, and connection to the Diablo Range for generations to come.

There are many ways to leave a legacy gift, including:

- A specific dollar amount through a bequest in your will or living trust.
- The remainder or a percentage of your estate, after taking care of your loved ones.
- Assets held in accounts, such as Individual Retirement Accounts (IRAs), 401(k), pension plans, or annuities.

For gifts of real estate or personal property, please contact us regarding our acceptance policies.

Wills and Trusts

One of the most common ways to plan a gift is by bequeathing it in your will or living trust. The following is sample text that might be helpful for your tax advisor or attorney when planning your bequest:

"I bequeath _____ percent (for example, 50%) of my estate OR \$_____ (exact monetary value) to Save Mount Diablo. Save Mount Diablo is a nonprofit corporation, organized and existing under the laws of California with principal business address of 201 N. Civic Dr., Suite 190, Walnut Creek, CA 94596. Tax identification number: 94-2681735."

Name Save Mount Diablo as a Beneficiary in Three Easy Steps

If you would rather not create a will or amend your current will or trust, assigning Save Mount Diablo as an account beneficiary is another easy way to plan your gift. Your retirement accounts, pension plans, investment accounts, donor advised funds, paid life insurance policies, or commercial annuities are options.



To designate Save Mount Diablo as your beneficiary, simply:

- Contact the institution holding your assets and request a beneficiary form (also referred to as a designation form). This can typically be found on the institution's website.
- Indicate our organization as a beneficiary with the following information: Save Mount Diablo, 201 N. Civic Dr., Suite 190, Walnut Creek, CA 94596. Tax ID: 94-2681735.
- Return the completed form to your plan administrator, insurance company, or financial institution.

Please Let Us Know Your Plans

Letting us know you've taken the generous step of remembering Save Mount Diablo in your will is always up to you, but we'd love to be able to welcome you to the Diablo Legacy Circle, show our gratitude, and keep you updated on our work. We hope you will share your plans with us through a simple verbal confirmation, or by completing our one-page legacy gift questionnaire. You do not need to disclose the details of your gift. While we would like to recognize you in our publications so that your generosity may inspire others, you may also choose to remain anonymous.

If you have any questions, we are here to help. Please contact Shannon Grover at 925-951-0306 or by email at sgrover@savemountdiablo.org. Thank you!