



Planned Giving - Bequest Information

Sample Bequest Language

This language is for illustration purposes only. Always consult a professional advisor or attorney when making or revising your will.

Residuary Bequest

Residue is the term used to describe the portion of an estate that remains after all debts, expenses, and specific bequests to others have been fulfilled:

"I give to Tri-Lakes Cares, of Monument, Colorado, Federal Tax ID#74-2501356, [all, or percent of] the rest, residue and remainder of my estate for its general purposes."

Specific Bequest

"I give to Tri-Lakes Cares, of Monument, Colorado, Federal Tax ID#74-2501356, the sum of \$ ____ for its general purposes."

Donation of Real Estate via Will

"I leave the real estate described as follows: [property description] to Tri-Lakes Cares, of Monument, Colorado, Federal Tax ID#74-2501356, for its general purposes."

Beneficiary Gifts for Retirement Plans & Bank Account

Naming Tri-Lakes Cares as a beneficiary is a simple and powerful way to support the life changing work of our organization without updating your will.

- Contact your plan administrator or financial institution for a change of beneficiary form.
- On the beneficiary form, decide what percentage, up to 100%, you would like Tri-Lakes Cares to receive. Please use the following information when listing Tri-Lakes Cares:

Legal Name: Tri-Lakes Cares

Legal Address: PO Box 1301, Monument, CO 80132

Federal Tax ID: #74-2501356

For more information about including Tri-Lakes Cares in your estate plans, please contact us at BillL@Tri-LakesCares.org or 719-370-1315.