

LEGACY GIFT/BEQUEST PLEDGE FORM

PLEDGE: I do hereby inform you that a legacy gift to RootedHomes located at 150 NE Hawthorne, Suite 110, Bend, OR 97702, is included in my estate plan. I will execute the bequest by adding charitable language to my estate plan.

Name(s)

Address

City

State

Zip

(____) _____
Phone

Email

SUGGESTED SAMPLE LANGUAGE FOR A BEQUEST IN SUPPORT OF ROOTEDHOMES

Thank for you considering making a gift in your will or trust to RootedHomes This suggested language for wills and trusts may be modified to meet your specific needs and we advise you to seek the advice of an estate planning attorney to incorporate this gift into your estate plan. Please share a copy of this form with your estate planning attorney. If you wish to direct your gift to a specific purpose, we would be happy to help you with appropriate language regarding our specific programs

Gift of Real Property: I give, devise, and bequeath all of my right, title, and interest in and to the real property located at [insert address or legal description] to RootedHomes, an Oregon non-profit corporation located at 150 NE Hawthorne, Suite 110 Bend, OR 97702, EIN #47-1089244, for RootedHomes' general use and purpose.

Specific Monetary Gift: I give, devise, and bequeath the sum of _____ (\$DOLLARS) to RootedHomes an Oregon non-profit corporation located at 150 NE Hawthorne, Suite 110 Bend, OR 97702, EIN #47-1089244, for RootedHomes' general use and purpose.

Specific Monetary Gift: I give, devise, and bequeath _____ percent (____%) of my total estate, determined as of the date of my death, to RootedHomes, an Oregon non-profit corporation located at 150 NE Hawthorne, Suite 110 Bend, OR 97702, EIN #47-1089244, for RootedHomes' general use and purpose.

The information contained above is not intended as legal or tax advice. Please consult with an attorney or tax advisor for such advice and for applicability of the above language to your particular circumstances.