



Monterey Bay Aquarium®

RECOMMENDED LANGUAGE FOR CHARITABLE GIFTS THROUGH ESTATE PLANS TO THE AQUARIUM'S ENDOWMENT FUND FOR THE FUTURE OF THE OCEAN

The Monterey Bay Aquarium Board of Trustees strongly encourages donors to designate contributions, including gifts through their estate plans, to the Aquarium's Endowment Fund for the Future of the Ocean that supports a broad range of programs including education, conservation and science, animal care and exhibits—all dedicated to advance our mission *to inspire conservation of the ocean*. Your gift to this endowment fund will last in perpetuity, if you use appropriate language. As you are discussing your estate plan with your attorney, we suggest the following language to designate a permanent gift to the Aquarium in your estate plan.

If you want to be sure that the Aquarium receives a gift:

"I give _____ (% of estate or specific dollar amount) to the Monterey Bay Aquarium Foundation, doing business as the Monterey Bay Aquarium, in Monterey, California, for its permanent Endowment Fund for the Future of the Ocean. The net appreciation there from, as defined by the Uniform Prudent Management of Institutional Funds Act, is to be expended as determined by the Aquarium's Board of Trustees."

If you would like the Aquarium to have a gift after you've made other gifts and from the remaining portion of your estate:

"I give the rest, residue and remainder (or a % of the rest, residue and remainder) of my estate to the Monterey Bay Aquarium Foundation, doing business as Monterey Bay Aquarium, in Monterey, California, for its permanent Endowment Fund for the Future of the Ocean. The net appreciation there from, as defined by the Uniform Prudent Management of Institutional Funds Act, is to be expended as determined by the Aquarium's Board of Trustees."

If you would like the Aquarium to have a gift only if other designated beneficiaries do not survive you:

"If _____ (named beneficiaries) do not survive me, I give _____ (% of estate; the rest, residue and remainder of my estate; or % of the rest, residue and remainder of my estate) to the Monterey Bay Aquarium Foundation, doing business as Monterey Bay Aquarium, in Monterey, California, for its permanent Endowment Fund for the Future of the Ocean. The net appreciation there from, as defined by the Uniform Prudent Management of Institutional Funds Act, is to be expended as determined by the Aquarium's Board of Trustees."

Named Endowment Funds:

If you choose, your gift of \$100,000 or more will establish a Named Endowment Fund for the Future of the Ocean and may be designated to support one of these major program areas – education, conservation and science, animal care or exhibits.

The Monterey Bay Aquarium's Tax ID number is: 94-2487469.

Please contact Mary Mullen in the Development Office at 831-648-4913 or mmullen@mbayaq.org or by mail at 886 Cannery Row, Monterey CA 93940 for additional information.



Monterey Bay Aquarium®

RECOMMENDED LANGUAGE FOR CHARITABLE GIFTS THROUGH ESTATE PLANS TO THE CHILDREN'S EDUCATION ENDOWMENT FUND

For many years, the Monterey Bay Aquarium Board of Trustees has strongly encouraged donors to designate contributions, including gifts through their estate plans, to the Aquarium's permanent endowment fund that supports a broad range of programs including education programs, research, conservation initiatives and new exhibits. In 2011, as part of our long-range commitment to inspiring future generations of ocean stewards, we established a special endowment fund called the *Children's Education Endowment Fund* that supports free visits for schoolchildren and their teachers. Your gift to this permanent fund will last in perpetuity, if you use appropriate language. As you are discussing your estate plan with your attorney, we suggest the following language to designate a permanent gift in your estate plan.

If you want to be sure that the Aquarium receives a gift:

"I give _____ (% of estate or specific dollar amount) to the Monterey Bay Aquarium Foundation, doing business as the Monterey Bay Aquarium, in Monterey, California, for its permanent Children's Education Endowment Fund. The net appreciation there from, as defined by the Uniform Prudent Management of Institutional Funds Act, is to be expended on education programs as determined by the Aquarium's Board of Trustees."

If you would like the Aquarium to have a gift after you've made other gifts and from the remaining portion of your estate:

"I give the rest, residue and remainder (or a % of the rest, residue and remainder) of my estate to the Monterey Bay Aquarium Foundation, doing business as Monterey Bay Aquarium, in Monterey, California, for its permanent Children's Education Endowment Fund. The net appreciation there from, as defined by the Uniform Prudent Management of Institutional Funds Act, is to be expended on education programs as determined by the Aquarium's Board of Trustees."

If you would like the Aquarium to have a gift only if other designated beneficiaries do not survive you:

"If _____ (named beneficiaries) do not survive me, I give _____
_____ (% of estate; the rest, residue and remainder of my estate; or % of the rest, residue and remainder of my estate) to the Monterey Bay Aquarium Foundation, doing business as Monterey Bay Aquarium, in Monterey, California, for its permanent Children's Education Endowment Fund. The net appreciation there from, as defined by the Uniform Prudent Management of Institutional Funds Act, is to be expended on education programs as determined by the Aquarium's Board of Trustees."

The Monterey Bay Aquarium's Tax ID number is: 94-2487469.

If you have questions or would like information on endowment naming opportunities, please contact Mary Mullen in the Development Office at 831-648-4913 or mmullen@mbayaq.org or by mail at 886 Cannery Row, Monterey CA 93940.