



Bequest Language

In order to make a bequest, it is important to speak with your attorney. Your attorney can help you include a bequest to Casa Dorinda in your estate plan. We have provided some basic bequest language to assist you and your attorney.

Specific Bequest

I hereby give, devise and bequeath the sum of \$_____ [or specific property] to the Montecito Retirement Association, dba Casa Dorinda, a not-for-profit corporation located at 300 Hot Springs Rd., Santa Barbara, CA, 93108, Federal Tax ID #23-7425754, for Casa Dorinda's general use and purpose.

Percentage Bequest

I hereby give, devise and bequeath ___ percent (___%) of my total estate, determined as of the date of my death, to the Montecito Retirement Association, dba Casa Dorinda, a not-for-profit corporation located at 300 Hot Springs Rd., Santa Barbara, CA, 93108, Federal Tax ID #23-7425754, for Casa Dorinda's general use and purpose.

Residual Bequest

I hereby give, devise and bequeath to the Montecito Retirement Association, dba Casa Dorinda, a not-for-profit corporation located at 300 Hot Springs Rd., Santa Barbara, CA, 93108, Federal Tax ID #23-7425754, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for Casa Dorinda's general use and purpose.

Contingent Bequest

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to the Montecito Retirement Association, dba Casa Dorinda, a not-for-profit corporation located at 300 Hot Springs Rd., Santa Barbara, CA, 93108, Federal Tax ID #23-7425754 DESCRIPTION OF PROPERTY to be used for Casa Dorinda's general use and purpose.

Note: If you wish to designate your gift to a specific Casa Dorinda fund, please substitute "general use and purpose" with the name of the fund you wish to donate to. If a specific fund is not identified, your unrestricted gift will be used where the need is greatest, according to the Montecito Retirement Association's Board policy.

For questions, please contact Lisa Thomas, Director of Philanthropy, lthomas@casadorinda.org or (805) 969-8070.