

Bequest Language

The following wording can be included in your new will or added as a codicil to your existing will in order to create a future gift from your estate.

Unrestricted bequest:

Such a bequest is an outright gift to SORCO. The organization may then apply the gift towards its programs as it sees fit. A suggested clause for such a gift is:

I give _____ (a specific amount of cash or designated property, or a percentage of the residue of the estate) to SORCO, South Okanagan Rehabilitation Centre for Owls (charitable business number 119158103RR0001), to be held or disposed of as the organization sees fit. My Executor and Trustee, in their sole discretion, may fulfill such gift by cash, publicly listed securities or a combination of cash and publicly listed securities.

I direct that the receipt of any person purporting to be an officer of SORCO be sufficient discharge for my Trustee for the payment of said charitable gift. My Trustee shall not be required to inquire into the authority of such person to give a valid receipt nor to see the application of such charitable gift.

Bequest with specific direction:

Such a bequest is a gift to SORCO with specific direction for its use. The organization will then use the gift and the proceeds arising from the gift for that specified purpose. A suggested clause for such a gift is:

I give _____ (a specific amount of cash or designated property, or a percentage of the residue of the estate) to SORCO, South Okanagan Rehabilitation Centre for Owls (charitable business number 119158103RR0001), to be used for a purpose related or of benefit to _____ (insert specific purpose). If, in the opinion of the Board of Directors of SORCO, it should become impossible, inadvisable or impractical to use this gift for the specified purpose(s), then the Board may, in their discretion, use the gift to the best advantage of SORCO, keeping in mind the original wishes of the donor.

My Executor and Trustee, in their sole discretion, may fulfill such gift by cash, publicly listed securities or a combination of cash and publicly listed securities. I direct that the receipt of any person purporting to be an officer of SORCO be sufficient discharge for my Trustee for the payment of said charitable gift. My Trustee shall not be required to inquire into the authority of such person to give a valid receipt nor to see the application of such charitable gift.