

We provide suggested bequest language for you to share with your attorney to assist in drafting estate planning documents that will achieve your charitable estate planning goals.

#### General Bequest

“I give and bequeath the rest, residue, and remainder of my estate, both real and personal, to the C&O CANAL ASSOCIATION, INC., EIN: 54-1384406, or its successor organization, to be used as its leadership shall determine appropriate.”

#### Contingent Bequest

“If [*insert name*] does not survive me, I give and bequeath the rest, residue, and remainder of my estate, both real and personal, to the C&O CANAL ASSOCIATION, INC., EIN: 54-1384406, or its successor organization, to be used as its leadership shall determine appropriate.”

#### Specific Bequest

“I give and bequeath \_\_\_\_\_ [*dollar amount, description of property, or percent of estate*] to the C&O CANAL ASSOCIATION, INC., EIN: 54-1384406, or its successor organization, to be used as its leadership shall determine appropriate.”

#### Residuary Bequest

“I give and bequeath all the rest, residue, and remainder of my estate, both real and personal, to the C&O CANAL ASSOCIATION, INC., EIN: 54-1384406, or its successor organization, to be used as its leadership shall determine appropriate.”

#### Restricted Bequest for Specific Purpose

“I give and bequeath \_\_\_\_\_ [*dollar amount, description of property, or percent of estate*] of the rest, residue, and remainder of my estate to C&O CANAL ASSOCIATION, INC., EIN: 54-1384406, or its successor organization, to be used for \_\_\_\_\_ [*describe or name the program*]. If at any time in the judgment of the C&O CANAL ASSOCIATION, INC. Board of Directors it is deemed impossible or impracticable to carry out the above purpose, the Board of Directors shall determine a purpose as near as possible to that described above.”

Current Funds are:

KENNETH ROLLINS C&O CANAL FUND, supports current projects and programs in and for the C&O Canal National Historical Park.

RACHEL STEWART SWAINS LOCK AREA IMPROVEMENT FUND, funds improvements to the area around Swains Lock, as they are identified in conjunction with the National Park Service.

Rachel Stewart, a former president of the Association who died in 2014, was the site manager at Swains Lock as part of the park's Canal Steward program.

DAVIES LEGAL DEFENSE FUND, supports the Association's involvement in activities such as opposition to the construction of the proposed Georgetown University boathouse within the C&O Canal National Historical Park. The Association opposes the transfer of public land to any individual or enterprise for private use.

WORLD CANALS CONFERENCE 2021 FUND, will help underwrite the Association's commitment to host the 2021 World Canals Conference in Hagerstown. This Fund will close after the 2021 Conference and any remaining funds will be transferred to the Association's operating funds.

#### Life Insurance or Retirement Plans

The C&O Canal Association can be designated as the primary beneficiary or a contingent beneficiary of a life insurance policy or retirement plans such as IRA, ROTH IRA, 401(k), 403(b), KEOGH plan, etc.

"C&O CANAL ASSOCIATION, INC., EIN: 54-1384406"