

BEQUESTS

SELF-REALIZATION FELLOWSHIP
PLANNED GIVING PROGRAM



Self-Realization Fellowship

FOUNDED 1920

Paramahansa Yogananda

BEQUESTS

Since our founding, Self-Realization Fellowship (SRF) has derived significant and ongoing support from bequest gifts. For many donors, one of the easiest ways of making a significant gift to SRF is through a bequest in their wills or living trusts. When you leave a bequest to SRF in your will or trust, you have the assurance of knowing your support will continue beyond your lifetime.

Your bequest to SRF can be made in the form of a specific gift of cash or other property, or a percentage of your estate. The latter allows more flexibility in planning.

TYPES OF BEQUESTS

Specific Bequest: SRF receives a specific dollar amount, or specific asset(s), such as a particular piece of real property, securities, or tangible personal property (such as works of art, coin collection, etc.).

Residuary Bequest: SRF receives all or a percentage of the remainder of your estate, after the payment of any specific bequests and all estate-related expenses.

Contingent Bequest: SRF receives the bequest only in the event of the death of other beneficiaries.

Testamentary Trust: This type of trust provides one or more beneficiaries with income for life, with all or a portion of the remaining assets to pass to SRF.

Testamentary QTIP Trust: This type of trust provides income, and principal if needed, to your spouse for life, with all or a portion of the remaining assets to pass to SRF.

Retirement Plan: SRF is the beneficiary of your qualified retirement plan or IRA.

Insurance Policy: SRF is the beneficiary to receive insurance proceeds from a policy that names you as the insured.

HOW TO INCLUDE SRF IN YOUR WILL OR TRUST

You may provide for SRF by creating a new will, adding a codicil to your existing will, including SRF in your living trust, or designating SRF as a beneficiary of your retirement plan or insurance policy.

Your bequest to SRF may be unrestricted, designated for the general purposes of the organization as a whole. It may also be restricted to a specific purpose, such as for the “SRF Encinitas Retreat” or “SRF Lake Shrine.” Generally, we encourage our members and friends to make their bequests unrestricted, allowing SRF to determine the appropriate use of the funds to carry out its mission of disseminating the teachings of Paramahansa Yogananda.

When making a gift by will or trust to SRF, we recommend the following language:

Unrestricted Bequest. An unrestricted bequest intended for the general purposes of SRF, one that the Board of Directors of SRF is free to use in whole or in part as it deems best, may read simply:

I hereby give, devise, and bequeath (the sum of _____ dollars, or _____ percent of my estate, or _____ shares of _____, or all of the residue of my estate) to Self-Realization Fellowship Church, a nonprofit, religious organization incorporated in the State of California, to be used for its general religious purposes.

Restricted Bequest. Your bequest for a restricted purpose may be expressed as follows:

I hereby give, devise, and bequeath (the sum of _____ dollars, or _____ percent of my estate, or _____ shares of _____, or all of the residue of my estate) to Self-Realization Fellowship Church, a nonprofit, religious organization incorporated in the State of California, for the benefit of _____, or to be used for _____ (for example, Center Tours by Monastics).

If you are specifying a purpose for your bequest, please do so as broadly as possible, and avoid detailed limits and descriptions. If circumstances permit, we would appreciate your consulting with us before drafting a detailed plan for a specific purpose. Additionally, if you specify a special purpose for your bequest, please consider granting SRF the authority to respond to changing needs by including a clause like this:

If, in the future, it is the opinion of the Board of Directors of Self-Realization Fellowship Church that all or part of the funds cannot be usefully applied for such purpose, it may be used for any related purpose, which in the opinion of the Board of Directors will most closely accomplish my wishes.

ADDITIONAL INFORMATION

If you have any questions or would like additional information, please contact:

SELF-REALIZATION FELLOWSHIP

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