FLORIDA KEYS HISTORY & DISCOVERY CENTER

Codicil to a Will

Planned giving form

Leave a gift to the Florida Keys History & Discovery Center in your will

With written directions to your executor (personal representative) to carry out the gift

PLEASE READ FIRST

This form is a template, not legal advice. Will and codicil rules differ by state, and a codicil must be signed with the same formalities as a will or it may not be valid. Please have your own estate attorney review the completed form before you sign it, and sign it in front of two witnesses and a notary so the self-proving affidavit can be completed. Do not sign a blank or partly completed copy.

Thank you for considering a legacy gift. This form is provided by the Florida Keys History and Discovery Foundation, Inc., which operates the Florida Keys History & Discovery Center, for donors who wish to leave an asset to the Center in their will.

Use this codicil to add or change one gift in an existing will without rewriting the whole will. You may leave a specific asset, a sum of money, or a share of what is left in your estate. The beneficiary is already filled in for you in Article II, and the codicil directs your executor in writing to deliver the gift and to settle any debt, lien, tax, or cost attached to the asset as you choose.

What you fill in

- **You, the donor (testator):** your full legal name, address, and county and state of residence.
- **Your original will:** the date of the will this codicil amends, and any earlier codicils.
- **The beneficiary:** already completed in Article II - Florida Keys History and Discovery Foundation, Inc., 82100 Overseas Highway, Islamorada, FL 33036, EIN 46-1936911.
- **The asset:** described clearly enough that your executor can identify it without guessing: for real estate, the address and legal description; for an account, the institution and last four digits; for an object or collection, what it is and where it is kept.
- **Any debt on the asset:** in Article III, check one box - your estate pays off any debt or lien before delivery, or the Foundation takes the asset subject to it.

How to sign it, in order

1. Fill in the whole codicil first. Fill every blank that applies and cross out or mark “N/A” on every option you are not using.
2. Gather two adult witnesses who are not beneficiaries under the will or this codicil, and a notary, in the same room (or by online notarization where your state allows it).
3. Sign in front of the witnesses. The witnesses then sign in front of you and each other.
4. Complete the self-proving affidavit in front of the notary on the same day.
5. File the original codicil with the original will, not in a safe-deposit box your executor cannot reach. Give a copy to your executor and, if you wish, to the Foundation. Tell your executor where the originals are.

CONSERVE · INSPIRE · ENGAGE

A gift in your will carries the mission forward: to conserve the history, culture, and ecosystems of the Keys, inspire next generations to discover them, and engage residents and visitors through exhibits, programs, and events.

info@keysdiscovery.com · (305) 922-2237 · keysdiscovery.com

Florida Keys History and Discovery Foundation, Inc. · 501(c)(3) · EIN 46-1936911 · FL Reg. CH38469 · 82100 Overseas Hwy, Islamorada, FL 33036

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE WITHIN THE STATE, 1-800-HELP-FLA (1-800-435-7352), OR AT WWW.FDACS.GOV. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. REGISTRATION #CH38469.

THE CODICIL

Codicil to Last Will and Testament

I, the person named below, being of sound mind and memory, make this Codicil to my Last Will and Testament dated as shown below (the "Will").

MY FULL LEGAL NAME (TESTATOR)

CITY OF RESIDENCE

COUNTY

STATE

DATE OF MY WILL

EARLIER CODICIL DATE(S) — IF NONE, WRITE "NONE"

Except as changed by this Codicil, I confirm my Will in full.

Article I — Confirmation of my Will

I ratify and confirm every provision of my Will that is not expressly changed by this Codicil. If any provision of this Codicil conflicts with my Will, this Codicil controls as to that provision only.

Article II — Charitable bequest to the Foundation

I give, devise, and bequeath to:

Florida Keys History and Discovery Foundation, Inc.
a Florida not-for-profit corporation and a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, operator of the Florida Keys History & Discovery Center
82100 Overseas Highway, Islamorada, FL 33036 · Federal tax ID (EIN): 46-1936911

the following gift. Check and complete each item that applies, and cross out any item that does not apply:

☐ **A specific asset.**
Describe it fully: the address and legal description for real estate; the institution and last four digits for an account; the item or collection and where it is kept for personal property.

☐ **A sum of money.**
Amount $ In words

☐ **A share of the residue of my estate:** percent of the rest, residue, and remainder of my estate, after debts, taxes, expenses, and specific gifts are paid.
Percent of residue

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☐ **Other gift (describe).**

OTHER GIFT

Purpose of the gift — check one:

☐ For the Foundation's general charitable purposes in operating the Florida Keys History & Discovery Center, to be used as its board directs.

☐ Only for the following purpose:

RESTRICTED PURPOSE

If no purpose box is checked, the gift is for the Foundation's general charitable purposes.

Article III — Directions to my executor

I direct my Executor — called my Personal Representative under Florida law — as follows:

1. Deliver and transfer the gift in Article II to the Florida Keys History and Discovery Foundation, Inc. as soon as reasonably possible after my death, after the gift is cleared for distribution in probate, and obtain a signed receipt from the Foundation.
2. Pay any costs of storing, insuring, packing, and delivering a gifted asset from my estate, unless I state otherwise here:

EXCEPTION TO COSTS (OR N/A)

3. Deliver the gift free of estate and inheritance taxes apportioned to it, where the law allows, so the Foundation receives the full gift, unless my Will directs otherwise.
4. Obtain proof, if reasonably requested, that the Foundation is a tax-exempt organization at the time of distribution before completing the transfer.

Debt or lien on a gifted asset — check ONE box and cross out the other:

☐ **Pay it off.** If the gifted asset is subject to a mortgage, loan, lien, or other debt at my death, my Personal Representative shall pay that debt from the residue of my estate so the Foundation receives the asset free and clear, provided the residue is sufficient and my Will does not direct otherwise.

☐ **Transfer subject to the debt.** The Foundation takes the asset subject to any mortgage, loan, lien, or other debt on it, and my estate shall not pay that debt.

If neither box is checked, the Foundation takes the asset subject to any debt or lien on it.

Article IV — If the Foundation cannot take the gift

If, at my death, the Florida Keys History and Discovery Foundation, Inc. named in Article II no longer exists, has merged into another organization, or is no longer a tax-exempt charitable organization, my Personal Representative shall give the gift instead to the successor organization, if there is one, or otherwise to one or more tax-exempt organizations with purposes as close as reasonably possible to those of the Foundation, as my Personal Representative selects with the approval of the probate court if required by law. The gift shall not fail and shall not pass to an individual because the named Foundation cannot take it.

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Article V — Everything else stays the same

In all other respects, my Will — and any earlier codicil listed above that I have not revoked — remains in full force and effect. This Codicil, my Will, and any such earlier codicil shall be read together as one document.

Signature of the donor (testator)

I sign this Codicil on the date below, in the presence of the two witnesses who sign below at my request, in my presence, and in the presence of each other.

SIGNATURE OF TESTATOR

DATE SIGNED

PRINTED NAME

ADDRESS

Attestation of witnesses

We, the witnesses named below, certify that the Testator signed (or directed another to sign) this Codicil in our presence, declared it to be a codicil to the Testator's Will, and asked us to witness it. At the Testator's request, in the Testator's presence, and in the presence of each other, we now sign our names as witnesses on the date written below.

Witness 1

SIGNATURE OF WITNESS 1

DATE SIGNED

PRINTED NAME

ADDRESS

Witness 2

SIGNATURE OF WITNESS 2

DATE SIGNED

PRINTED NAME

ADDRESS

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SELF-PROVING AFFIDAVIT

Self-Proving Affidavit — Fla. Stat. § 732.503

Complete this affidavit in front of a notary public on the same day the Codicil is signed. It lets the court admit the Codicil without locating the witnesses later; it does not replace the witness signatures. This is the Florida statutory form. If you live outside Florida, ask your attorney to use your state's form.

STATE OF _____ COUNTY OF _____

I, _____

declare to the officer taking my acknowledgment of this instrument, and to the subscribing witnesses, that I signed this instrument as a codicil to my will.

_____
TESTATOR

We, _____ and _____

have been sworn by the officer signing below, and declare to that officer on our oaths that the testator declared the instrument to be a codicil to the testator's will and signed it in our presence and that we each signed the instrument as a witness in the presence of the testator and of each other.

_____ _____
WITNESS WITNESS

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Self-Proving Affidavit

Notary certificate

Acknowledged and subscribed before me by the testator, and sworn to and subscribed before me by each of the following witnesses, by the means checked for each:

TESTATOR — TYPE OR PRINT NAME

TYPE OF IDENTIFICATION PRODUCED

☐ Personally known ☐ Produced identification ☐ Physical presence ☐ Online notarization

FIRST WITNESS — TYPE OR PRINT NAME

TYPE OF IDENTIFICATION PRODUCED

☐ Personally known ☐ Produced identification ☐ Physical presence ☐ Online notarization

SECOND WITNESS — TYPE OR PRINT NAME

TYPE OF IDENTIFICATION PRODUCED

☐ Personally known ☐ Produced identification ☐ Physical presence ☐ Online notarization

Subscribed by me in the presence of the testator and the subscribing witnesses, by the means specified herein, all on

SIGNATURE OF OFFICER

COMMISSION EXPIRES

PRINT, TYPE, OR STAMP COMMISSIONED NAME

AFFIX OFFICIAL SEAL

After signing — checklist

- ☐ Original Codicil filed with the original Will; my executor knows where both are.
- ☐ Copy given to my executor (personal representative).
- ☐ Copy sent to the Florida Keys History and Discovery Foundation, Inc., 82100 Overseas Highway, Islamorada, FL 33036, if I wish the Foundation to know of my gift in advance.
- ☐ My own estate attorney reviewed the completed Codicil before I signed it.

To change this gift later, sign a new codicil or a new will. Do not hand-write changes on a signed codicil; handwritten changes are a common reason gifts fail in probate.

Keep this checklist with your copy, not necessarily with the original filed for probate. Questions about a gift in your will? Contact us at info@keysdiscovery.com or (305) 922-2237. Telling us about your plans is optional and confidential, and it lets us thank you during your lifetime.

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