



## Sample Bequest Language

The most common form of giving after someone's lifetime is a gift of assets (money and/or other property) that is made through their will, living trust or other testamentary arrangement. No funds are transmitted or irrevocably transferred until after death. Donors may support any charitable organizations or causes anywhere in the nation such as religious institutions, education, public parks, etc. Donors wishing to support charities outside of the U.S. should contact the Community Foundation to discuss in advance.

Fulfilling someone's charitable legacy through the Community Foundation can be done in one simple sentence, much like the samples below:

### **Sample Language for Gifts Going Into a Fund at the Community Foundation:**

"I give, devise and bequeath \_\_\_\_\_ (describe dollar amount, property to be given, or proportion of residuary estate) to the Community Foundation for Palm Beach and Martin Counties, a nonprofit corporation located in West Palm Beach, Florida 33401, tax identification number 23-7181875, to benefit the \_\_\_\_\_ (enter name of fund at the Community Foundation, such as the "Smith Family Legacy Fund".)

### **Sample Language for Gifts Going to the Community Foundation without a Previously Established Fund:**

"I give, devise and bequeath \_\_\_\_\_ (describe dollar amount, property to be given, or proportion of residuary estate) to the Community Foundation for Palm Beach and Martin Counties, a nonprofit corporation located in West Palm Beach, Florida 33401, tax identification number 23-7181875, to support the following charitable purpose(s) \_\_\_\_\_ (enter name of charities/program or area of interest, such as afterschool programs for disadvantaged youth.)

**Contact our team of gift planning specialists to learn more about making a gift to the causes you care about through your will or developing customized gift language to meet your giving goals.**

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Important: When making a planned gift (such as a gift in your will, life insurance or retirement plans), please contact the Community Foundation when you choose to name the Community Foundation as a beneficiary so that we can ensure your charitable intention(s) is/are fulfilled.

The appropriate wording for making a gift depends on the type of gift, state law and the donor's unique circumstances. The Community Foundation urges all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their gifts, and the resulting tax and estate planning consequences.

**Tax ID Number of the Community Foundation for Palm Beach and Martin Counties**

23-7181875