



Sample Bequest Language

If a gift is being made through a donor's **will**, the following may be used. Please see below for additional language to indicate the donor's intent for the gift's purpose:

Percentage of estate to a named fund:

"I give, devise and bequeath to the Community Foundation of North Florida (Tax ID Number 59-3473384), its successor or successors, ___ percent (_%) of my estate to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

A specific dollar amount or gift of specific property to a named fund:

"I give, devise and bequeath to the Community Foundation of North Florida (Tax ID Number 59-3473384), its successor or successors, the sum of _____ Dollars (\$ _____)
AND/OR
_____ shares of stock in _____ (Name of Company) to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Residual interest in estate to a named fund:

"I give, devise and bequeath all the rest, residue and remainder of my estate of every kind and character, real, personal and mixed, tangible and intangible, and wherever situate, to the COMMUNITY FOUNDATION OF NORTH FLORIDA, (Tax ID Number 59-3473384), its successor or successors, to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Contingent interest in estate to a named fund:

"If, upon my death, there is no person in being qualified to receive an interest in my estate under the foregoing provisions of this Will, then such interest, or the portion thereof with respect to which a total failure of qualified recipients has occurred, shall be distributed to the Community Foundation of North Florida, (Tax ID Number 59-3473384), its successor or successors, to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."



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If a gift is being made through a donor's **trust**, the following language may be used. Please see below for additional language to indicate the donor's intent for the gift's purpose:

Percentage of trust principal:

"The Trustee shall distribute _____ percent (_%) of the then principal of the trust to the Community Foundation of North Florida (Tax ID Number 59-3473384), its successor or successors, to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Specific dollar amount from trust:

"The Trustee shall distribute the sum of _____ Dollars (\$) to the Community Foundation of North Florida (Tax ID Number 59-3473384), its successor or successors, to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Residual balance of the trust:

"After making provisions for or making any payment pursuant to the provisions above, the Trustee shall distribute the remaining principal of the trust to the Community Foundation of North Florida (Tax ID Number 59-3473384), its successor or successors, to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Contingent beneficiary of trust:

" If, at the death of the Grantor or at any time after the death of the Grantor, there is no person in being qualified to receive the principal of the Trust or the benefits thereof under the foregoing provisions of the Trust, then such Trust, or the portion thereof with respect to which a total failure of qualified recipients has occurred, shall be distributed to the Community Foundation of North Florida (Tax ID Number 59-3473384), its successor or successors, to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Donor intent for the gift's purpose:

You may designate a specific organization, fund or charitable cause using the language outlined below. If you need additional help, Community Foundation of North Florida staff is available to assist in developing the appropriate language for your will or trust to be sure your wishes are clear.



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Opportunity Fund:

"to be added to the unrestricted Opportunity Fund of the Community Foundation of North Florida (Tax ID Number 59-3473384)."

Designated Funds:

"to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), to support (Name of Nonprofit Organization). The fund shall be subject to the Foundation's Bylaws and Articles of Incorporation."

Field of Interest Funds:

"to establish the (NAME OF FUND AS CHOSEN BY THE DONOR), which shall be subject to the Foundation's Bylaws and Articles of Incorporation, or add to an existing fund, the purpose of which is to support (Describe the cause or area of interest, e.g., the arts, education, the elderly, homelessness, etc.)."

Community Foundation of North Florida Operating Endowment:

"to be added to the Community Foundation of North Florida's Operating Endowment."