



Sample Bequest Language

Please provide this language to your estate planning attorney to use when executing and/or updating your estate planning documents.

Language for Gifts from a Donor's Estate

Percentage of the 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, _____% 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."

Specific Dollar Amount or 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 \$_____ 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 the 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 the 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."

Language for Gifts from a Donor's Trust

Percentage of the Trust Principal

"The Trustee shall distribute _____% 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 the Trust

"The Trustee shall distribute the sum of \$_____ 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."