TAHOE TRUCKEE COMMUNITY FOUNDATION

uncommon people common ground

Sample Testamentary Language

Specific Bequest
"I give to Tahoe Truckee Community Foundation, a California nonprofit corporation, Tax ID # 68-0416404, $_____ to be used for the Foundation's charitable purposes in accordance with and subject to the governing instruments of the Community Foundation [to be used for …] *or* [to be added to the _____Fund*] *or* [to establish the _____Fund for the following purposes _____**]."

Percentage Bequest
"I give to Tahoe Truckee Community Foundation, a California nonprofit corporation, Tax ID # 68-0416404, ____% of my residuary estate to be used for the Foundation's charitable purposes in accordance with and subject to the governing instruments of the Community Foundation [to be used for …] *or* [to be added to the _____Fund*] *or* [to establish the _____Fund for the following purposes ____**]."

Residuary Bequest
"I give to Tahoe Truckee Community Foundation, a California nonprofit corporation, Tax ID # 68-0416404, the remainder of my estate, both real and personal, to be used for the Foundation's charitable purposes in accordance with and subject to the governing instruments of the Community Foundation [to be used for …] *or* [to be added to the _____Fund*] *or* [to establish the _____Fund for the following purposes _____**]."

Contingent Bequest
"If the above-named beneficiary(ies) predecease(s) me, then I give such amounts of property absolutely to Tahoe Truckee Community Foundation."

***Adding to an existing Fund of the Community Foundation**
If your client wishes to support an existing fund at the Community Foundation please contact us for complete list of endowed funds or visit www.ttcf.net .

****Establishing a new Fund by bequest**
If your client's gift meets the minimum contribution required of $10,000, the donor may create a separately identifiable permanently endowed fund by name and purpose by adding language from one of the options below:

Named Fund/Unrestricted Purpose
This devise will be used to establish an endowed fund at Tahoe Truckee Community Foundation, a California nonprofit corporation, Tax ID # 68-0416404, known as the _____Fund. It is my intent and expectation that the Fund be a permanent endowment fund and may not be wholly expended. Distributions from the Fund will be made as the Community Foundation deems appropriate to those charitable organizations or for those charitable purposes determined by the Board of Directors in accordance with its investment and distribution policies as may be amended from time to time.

11071 Donner Pass Road
P.O. Box 366, Truckee, CA 96160
530-587-1776 www.ttcf.net

Achieves national standards of excellence for community foundations.

Field of Interest Fund
This devise will be used to establish a field of interest fund at Tahoe Truckee Community Foundation, California nonprofit corporation, Tax ID # 68-0416404, to be known as the _____Fund. I direct that the distributions from the Fund be used for _____ . *(specify broad area of charitable purpose - for example, "K-16 education", "the arts", "conservation")* It is my intent and expectation that the Fund be a permanent endowment fund. Distributions from the fund will be made as the Community Foundation deems appropriate in accordance with investment and distribution policies adopted by the Board of Directors as may be amended from time to time.

Designated Fund
This devise will be sued to establish a designated fund at Tahoe Truckee Community Foundation, California nonprofit corporation, Tax ID # 68-0416404, to be known as the _____Fund. I direct that the distributions from the Fund be used to support _____(insert name of particular charitable organization to be supported, e.g. Arts for the Schools, Project MANA, Tahoe Rim Trail etc.). It is my intent and expectation that the Fund be a permanent endowment fund. Distributions from the Fund will be made as the Community Foundation deems appropriate in accordance with investment and distribution policies adopted by the Board of Directors as may be amended from time to time.

Scholarship Fund
This devise shall be used to establish a Scholarship Fund at Tahoe Truckee Community Foundation, California nonprofit corporation, Tax ID # 68-0416404, to be known as the _____Fund to support scholarships for _____.

It is my intent and expectation that the Fund be a permanent endowment fund. Distributions from the Fund will be made as the Community Foundation deems appropriate in accordance with investment and distribution policies adopted by the Board of Directors as may be amended from time to time.

Donor Advised Fund
This devise shall be used to establish a donor advised fund at Tahoe Truckee Community Foundation, California nonprofit corporation, Tax ID # 68-0416404, to be known as the _____Fund.

It is my intent and expectation that the Fund be a permanent endowment fund. Distributions from the Fund will be made as the Community Foundation deems appropriate in accordance with investment and distribution policies adopted by the Board of Directors as may be amended from time to time.

I direct that an Advisory Committee consisting of _____, _____, and _____ may make written recommendations from time to time to the Board of Directors concerning grants from the Fund, provided the proposed grant is in furtherance of the general charitable purposes of the Community Foundation. I recognize that these recommendations may be accepted or rejected, in whole or in part, by the Board of Directors in its sole discretion.

Legacy Society
The Legacy Society is a way to celebrate the generosity of those who have made a planned gift to the Community Foundation. We encourage all donors who are making a gift to fill out the form below so that we may recognize that spirit of generosity.

Tahoe Truckee Community Foundation is happy to honor the wishes of donors that prefer to remain anonymous.

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Confidential Gift Plan Information
Indication of Planned Gift

I/We have made provisions for a gift to Tahoe Truckee Community Foundation in my/our estate plan:

		Estimated Current Value:
☐	Will	$_____
☐	Beneficiary of life insurance policy	$_____
☐	Beneficiary of IRA or other deferred account	$_____

Beneficiary of a trust

☐	Revocable beneficiary	$_____
☐	Irrevocable beneficiary	$_____
☐	Gift Annuity	$_____
☐	Other (please describe)	$_____

_____

_____

_____

Tahoe Truckee Community Foundation keeps the details of your gift confidential and you are welcome to decline public recognition; however, public recognition is encouraged so that you may be an inspiration to others.

☐ you may publish my/our names as a ***Legacy Society*** member of Tahoe Truckee Community Foundation. My/our names should be listed as follows:

Name(s)_____

Address: _____

City:_____ State_____ Zip_____

Phone: _____ Email:_____

☐ Please do not publish my/our names(s) as a member of the ***Legacy Society***.