

Sample Gift Language

PROFESSIONAL RESOURCES



PREPARING A LEGACY GIFT THROUGH AN ESTATE

Every gift from an estate will be designated to serve Chippewa County's people and resources. Gifts can be designated within the will, revocable trust, or beneficiary designation to the Community Foundation.

Gifts to existing and unrestricted endowment funds provide the most impact in meeting our community's most pressing needs. Utilize the sample bequest language below to assist in making gift requests.

When an estate gift is intended to establish a new fund, we partner with you and your client to delineate the terms of the fund based on the donor's charitable intent. This ensures equal suitability for you, your client, and the Foundation.

BEQUEST FOR THE "FUND FOR CHIPPEWA COUNTY"

"I give to the Community Foundation of Chippewa County Inc., a Wisconsin nonprofit public charity, [insert the percentage of your estate, trust or a sum of money] OR [all my right, title and interest in the following described property _____]. This gift shall be used for the Community Foundation's Fund for Chippewa County and shall be invested and distributed at the sole discretion of the Community Foundation of Chippewa County's Board of Directors."

BEQUEST FOR THE "COMMUNITY FOUNDATION OPERATING FUND"

"I give to the Community Foundation of Chippewa County Inc., a Wisconsin nonprofit public charity, [insert the percentage of your estate, trust or a sum of money] OR [all my right, title and interest in the following described property _____]. This gift shall be used for the Community Foundation of Chippewa County's Operating Fund and shall be invested and distributed at the sole discretion of the Community Foundation of Chippewa County's Board of Directors."

BEQUEST AN EXISTING FUND

"I give to the Community Foundation of Chippewa County Inc., a Wisconsin nonprofit public charity, [insert the percentage of your estate, trust or a sum of money] OR [all my right, title and interest in the following described property _____]. This gift shall be given to the existing[Name] Fund/s. I understand the Community Foundation of Chippewa County's Board of Directors holds legal responsibility for the Fund and is solely responsible for the investment of and distributions from the Fund.

