

Sample Bequest Language

Below, we have listed some of the more common kinds of bequests, and some bequest language. We always recommend that you carefully review the terms of your will with a professional trained in handling trusts and estates.

General Bequests are legacies left to certain people or causes that come from the general value of the estate, and are made by designating a specific dollar amount, a particular asset or a fixed percentage of your estate to the cause of your choice.

General bequest language:

"I give, devise, and bequeath to NAME OF CHARITY/LOCATION, the sum of \$_____ (or a description of the specific asset), for the benefit of NAME OF CHARITY and its general purposes."

Specific Bequests are made when a particular item or property is bequeathed for a designated purpose. (i.e., instruments bequeathed to the local school district for use in music education; dollar funds to be used in the operation of a school or church.)

Specific bequest language:

"I give, devise, and bequeath to NAME OF CHARITY/LOCATION, the sum of \$_____ (or a description of a specific asset), for the benefit of NAME OF CHARITY to be used for the following purpose: (state the purpose). If at any time in the judgment of the trustees of NAME OF CHARITY it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose."

Residuary Bequests are made when you intend to leave the residue portion of your assets after other terms of the will have been satisfied.

Residuary bequest language:

"All the rest, residue, and remainder of my estate, both real and personal, I give to NAME OF CHARITY/LOCATION, for its general purposes."

Contingency Bequests allow you to leave a portion of your estate to a particular charity if your named beneficiary does not survive you.

Contingency bequest language:

"I devise and bequeath the residue of the property, real and personal and wherever situated, owned by me at my death, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I devise and bequeath my residuary estate to NAME OF CHARITY/LOCATION, for its general purposes."

OR

"After Settlers' deaths, the Trustee shall distribute ___ (e.g. percentage, amount) of the trust estate to Community Foundation Sonoma County– 250 D Street, Suite 205, Santa Rosa, California, 95404, a 501c3 organization, charitable tax ID no. 68-0003212 – to support, within the discretion of Community Foundation Sonoma County, those purposes that the Settlers determine through a written gift agreement with Community Foundation Sonoma County."

Language for:

Outright Bequest:

I give [\$_____] or [specified property] to Community Foundation Sonoma County (TIN 68-0003212), to be used for its general purposes.

I give [\$_____] or [specified property] to Sonoma Valley Fund of Community Foundation Sonoma County (TIN 68-0003212), to be used for its general purposes.

Gift for the Foundation's unrestricted use:

I give [\$_____] or [specified property] to Community Foundation Sonoma County (TIN 68-0003212) to be held and administered as part of the Foundation's community Fund with distributions to be made as part of the Foundation's annual grants process. Distributions shall be made annually in accordance with the Foundation's policies and guidelines.

Gift to a Field of Interest (Program Area) Fund:

I give [\$_____] or [specified property] to the Community Foundation Sonoma County (TIN 68-0003212) to be held and administered by the Foundation as the [name of fund] Endowment Fund. Distributions shall be made annually in accordance with the Foundation's policies and guidelines. Distributions shall be for the following charitable purpose(s):

OR

I give [\$_____] or [specified property] to the Community Foundation Sonoma County (TIN 68-0003212) to be held and administered by the Foundation based on terms established in a Planned Gift Agreement created by the Donor and kept on file at the Community Foundation.