

# Bequests Sample Testamentary Language

## Specific Bequest

"I give to the Community Foundation of Greater Rochester, a Michigan nonprofit corporation, \$\_\_\_\_\_ to be used for the Community Foundation's charitable purposes [or 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 the Community Foundation of Greater Rochester, a Michigan nonprofit corporation, \_\_\_\_% of my residuary estate to be used for the Community Foundation's charitable purposes [or 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 the Community Foundation of Greater Rochester, a Michigan nonprofit corporation, the remainder of my estate, both real and personal, to be used for the Community Foundation's charitable purposes [or 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 the Community Foundation of Greater Rochester."

**If your client's gift meets the minimum contribution required, he/she may create a separate named endowed fund with a specific named purpose by adding language from one of the four options below:**

**Named Fund/Unrestricted Purpose:** This devise will be used to establish a fund at the Community Foundation of Greater Rochester known as the \_\_\_\_\_ Fund. I direct that the annual distributions from the Fund be used exclusively for the charitable purposes of the Community Foundation as set forth in the Articles and Bylaws as determined from time to time by the Board of Trustees.

**Field of Interest Fund:** This devise will be used to establish a field of interest fund at the Community Foundation of Greater Rochester to be known as the \_\_\_\_\_ Fund. I direct that the annual distributions from the Fund be used for [specify charitable purpose - for example, "culture", "community development", "education", "the environment", "human concern", or "youth" in the Greater Rochester area].

**Designated (Agency Endowment) Fund:** This devise will be used to establish a designated fund at the Community Foundation of Greater Rochester to be known as the \_\_\_\_\_ Fund. I direct that the annual distributions from the Fund be used to support [insert name of a particular charitable organization to be supported, e.g. "Rochester Hills Museum at Stoney Creek" or "Rochester Hills Public Library"].

**Donor Advised Fund:** This devise shall be used to establish a donor advised fund at the Community Foundation of Greater Rochester to be known as the \_\_\_\_\_ Fund. I direct that an Advisory Committee consisting of \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ may make written recommendations from time to time to the Board of Trustees concerning grants from the Fund, provided the proposed grants further the general charitable purposes of the Community Foundation. I recognize that grant recommendations are advisory and may be accepted or rejected, in whole or in part, by the Board of Trustees in its sole discretion.

**Community Foundation of Greater Rochester**

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