



## Sample Bequest Language

The appropriate wording for making a gift depends on the type of gift, state law and the donor's unique circumstances. Story County Community Foundation recommends that each person considering a planned gift consult with her or his own legal or financial advisor.

You may choose to name Story County Community Foundation as a charitable beneficiary for a specific bequest, a residual bequest, or a contingent bequest in your will or trust documents. You may also designate the use of your future gifts, or may leave the distributions to the discretion of the SCCF's Board of Directors. Lastly, a future gift may be used to establish a new fund or may be added to any of SCCF's existing funds. We urge you to contact Story County Community Foundation so that we may ensure that your wishes are carried out.

The following will provisions are examples of how a donor may designate a gift.

### **Unrestricted General Legacy:**

I give to the Community Foundation of Greater Des Moines, Des Moines, IA (Tax ID 42-6139033), for the benefit of the Story County Community Foundation, the sum of \$\_\_\_\_\_ for its general purposes.

### **Specific Legacy:**

I give my \_\_\_\_\_ (specific personal property item(s) and/or real property) \_\_\_\_\_ to the Community Foundation of Greater Des Moines, Des Moines, IA (Tax ID 42-6139033), for the benefit of the Story County Community Foundation, for its general purposes.

### **Gift or Residuary Estate:**

All the rest, residue and remainder of my estate, both real and personal, and wherever situated, I give, devise and bequeath to the Community Foundation of Greater Des Moines, Des Moines, IA (Tax ID 42-6139033), for the benefit of the Story County Community Foundation, for its general purposes.

### **Gift for a Specific Purpose:**

I give, devise and bequeath to the Community Foundation of Greater Des Moines, Des Moines, IA (Tax ID 42-6139033), for the benefit of the Story County Community Foundation, the sum of (or property herein described), to be used for \_\_\_\_\_. At any time, however, in the event the original purpose of the gift no longer exists as determined by the board of directors, the board shall redirect the proceeds of this gift to another purpose as determined by the board.

*Story County Community Foundation is an affiliate of the Community Foundation of Greater Des Moines, an Iowa nonprofit located at 1915 Grand Avenue, Des Moines, Iowa. This publication is for general purposes only and is not intended as legal or financial advice. Story County Community Foundation recommends that each person considering a planned gift consult with her or his own legal or financial advisor.*

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