



THE COMMUNITY FOUNDATION  
*of Shelby County*

*Turning Generosity into Impact*

## Bequest Language

Bequests are statements in a Last Will and Testament that identify estate gifts and intended recipients, commonly known as ‘beneficiaries.’

When the Community Foundation of Shelby County receives a gift from an estate, often a Last Will and Testament statement or a pre-written agreement guides the way the gift should be administered. Some bequests have a broad scope, while others more narrowly focus the use of the gift.

### Suggested Bequest Language

I give, devise and bequeath to The Community Foundation of Shelby County (FEIN 34-6565194), an Ohio nonprofit corporation, \_\_\_\_\_  
(percentage of estate, specific dollar amount, marketable security, tangible personal property, remainder of estate, etc.).

- **To provide for changing community needs, add:** “I request that this gift be used for general purposes of said Foundation.”
- **To add to an existing charitable fund, add:** “I request that this gift be used to add to the (name of fund) Fund. Should this fund no longer exist, the Foundation in its sole judgment, may direct my gift to another fund of the Foundation whose purpose is closely associated with the intended purpose of \_\_\_\_\_.”
- **To create a new charitable fund (minimum \$25,000), add:**
  - *If a pre-written fund agreement exists with the Community Foundation:*  
“I request that this gift establish a charitable fund to be known as the \_\_\_\_\_ Fund.”
  - *If no pre-written agreement exists:*  
“I request that this gift establish an endowed charitable fund, the \_\_\_\_\_ Fund. Fund distributions shall be used for the purpose(s) of \_\_\_\_\_, with the understanding that if it shall appear to said Foundation that such restriction or condition becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the service area, that the Foundation in its sole judgment, may direct the application of fund distributions to a general purpose of the Foundation closely associated with the intention of this bequest and in accordance with the Foundation’s Articles of Incorporation and Code of Regulations, as now or hereafter amended.”

**Disclaimer: Nothing within this website should be construed as legal advice. The above wording is for information only and should be discussed with your attorney.**