



Suggested Language for Charitable Bequests

The following language may be helpful to your attorney in facilitating your legacy gift to the Community Foundation of North Central Washington. You may be able to direct your attorney to prepare a codicil, or amendment to your existing will or trust. It is usually not necessary to revise the entire document.

For a specific amount

"I bequeath to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington, the sum of _____ dollars (\$_____) for its general purposes."

For a specific piece of property

"I bequeath to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington, my _____ (art collection, etc.)." (Note: Bequests of real property require special handling. Please contact the Foundation for assistance.)

For a percentage of your estate

"I bequeath to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington, ___% of my adjusted gross estate as finally determined for federal estate tax purposes."

For your residuary estate

"I devise and bequeath the residue of the property owned by me at my death, real and personal and wherever situate, to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington."



For a specific purpose

"I bequeath to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington, the sum of _____ dollars (\$ _____) to be used for _____." (Please contact the Foundation to discuss the charitable vehicle that best matches your area of interest. We will supply precise language to convey your intention.)

To Establish a Testamentary Trust or Gift Annuity

"I bequeath to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington _____ (percentage, residuary estate, specific property, amount) to be used to establish a Charitable _____ (Remainder Trust or Annuity Trust). Beneficiary(ies) of the Trust shall be _____ (name(s), SSN) and shall receive payments for life at _____ percent (%) (no less than 5%, no more than 7%). Should said beneficiary(ies) not survive me, I devise and bequeath my residuary estate to the Community Foundation of North Central Washington, a Washington charitable corporation, for its general purposes."

"I bequeath to the Community Foundation of North Central Washington, Incorporated (a Washington charitable corporation), of Wenatchee, Washington _____ (percentage, residuary estate, specific property, amount) to be used to establish a Charitable Gift Annuity(ies). Annuitant(s) shall be _____ (name(s), SSN) and shall receive payments for life at the current rate established by the American Council on Gift Annuities. Should said beneficiary(ies) not survive me, I devise and bequeath my residuary estate to the Community Foundation of North Central Washington, a Washington charitable corporation, for its general purposes."