

Planning Your Legacy

Giving Back to the Place You Love, Forever

In many ways, you have made a difference in the lives of your family, friends, neighbors, and countless others during your lifetime. Planning for your legacy gives you a chance to continue making a difference to the people and places you love - forever.



The Community Foundation of NCW works with you and your professional advisor to include your charitable interests in your will. Whether you support the arts, your local church, education, or want to help protect the environment - we can help ensure you leave a legacy through your continued financial support.

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."



www.cfncw.org | (509) 663-7716

Planning Your Legacy

Suggested Language for Charitable Bequests (continued)

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."

Contact Us for a Private Consultation

You want to leave a legacy and support the causes you love, forever. We will work with you and your financial planner to create a legacy plan with maximum benefits.

To schedule a private consultation, call us at (509) 663-7716 or email Executive Director, Beth Stipe, at beth@cfncw.org.