



DULUTH SUPERIOR AREA
**COMMUNITY
FOUNDATION**

Private giving for the public good.

Sample Bequest Language

With a minimum bequest of \$25,000, clients of professional advisors could choose to establish a named field of interest fund. The following is some suggested will language for your consideration.

1) *I give and bequeath the sum of \$_____ to the Duluth-Superior Area Community Foundation to establish the _____ Fund, a field of interest fund, under the umbrella of the Duluth Superior Area Community Foundation.*

2) *I give and bequeath _____ per cent of my estate to the Duluth-Superior Area Community Foundation to establish the _____ Fund, a field of interest fund, under the Duluth Superior Area Community Foundation.*

3) *I give, devise and bequeath all the residue and remainder of my estate to the Duluth-Superior Area Community Foundation to establish the _____ Fund, a _____ fund, under the umbrella of the Duluth Superior Area Community Foundation.*

It is possible for professional advisor clients to include a bequest establishing the field of interest fund in their wills and subsequently describe the activities in a letter. The following is some suggested will language which could accomplish this purpose.

4) *The language of this Will reflects the charitable intent of the Trustor[s] as of the date signed. In the event that there is future correspondence between the Trustor[s] and the Duluth-Superior Area Community Foundation about the _____ Fund, the charitable intent expressed in the most recent correspondence will govern the charitable intent of the _____ Fund.*

This document was created for informational purposes only and should not be viewed as formal tax advice or legal opinion. The Duluth Superior Area Community Foundation strongly encourages those individuals interested in including the Community Foundation in their estate plans to discuss this provision with qualified legal and financial advisers.

FOR ADDITIONAL INFORMATION OR ASSISTANCE, PLEASE CONTACT:
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