



SAMPLE BEQUEST LANGUAGE

The following sample language can be used for estate gifts through:

- Wills
- Living Trusts
- Retirement Plan Designations
- Life Insurance Beneficiary Designations
- Contingent provisions in any of the above estate documents

Each individual situation is unique, therefore the following a sample provision. To assist you with your estate plans, the Community Foundation of the South Jersey can provide customized sample language for the causes you may wish to support. To request customized language, please contact the foundation office.

"I give to the Community Foundation of South Jersey, an affiliate of the Community Foundation of New Jersey, a nonprofit corporation located in Morristown, NJ (Tax ID 22-2281783), all my title and interest in the following described property:

[list property here].

This gift is to establish/contribute to the _____ Fund.

Should the Community Foundation of South Jersey break affiliation with the Community Foundation of New Jersey to operate under Southern New Jersey Regional Community Foundation, a nonprofit corporation located in Haddonfield, NJ (Tax ID 26-1885776) or other nonprofit corporation, the fund will be transferred to the corporation and continue in accordance with the written agreement.

In the event that it becomes unnecessary, undesirable, impractical or impossible to utilize funds for such purposes, the Community Foundation of South Jersey shall have the right to utilize the Fund for such other charitable purposes aligned closely with the donor's intent as the governing board deems appropriate, in accordance with the governing instruments of the foundation, as amended from time to time."

We will work with you to establish the details of the fund and how it should be used to fulfill your charitable intent in a separate document. This agreement can be amended at any time before the bequest is received. This avoids the necessity of amending estate documents if you change your mind about the purpose of the fund.