



SAMPLE WILL/BEQUEST LANGUAGE for PLANNED GIFTS

The staff and Board of Directors offer this sample will/bequest language to help in the creation or addition of charitable giving opportunities in our area. We sincerely hope this language helps donors make or modify their estate plans, and helps professional advisors assist their clients. We invite donors and advisors to consider the Solano Community Foundation as a partner in the building of philanthropic resources for the betterment of our community. Please feel free to contact us at 707-399-3846 if we can be of assistance.

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Below is sample language which may be used in creating a Will, Codicil, Charitable Remainder Trust, or Revocable Living Trust as a planned gift to the Solano Community Foundation. Any of these charitable instruments may be used to establish a charitable fund, add to a current endowment fund, or contributed to the Foundation for operations and program support.

UNRESTRICTED GIFT OF SPECIFIC DOLLAR AMOUNT or PERCENTAGE CONTRIBUTION

I/We, [DONOR NAME] give and bequeath to the Solano Community Foundation, a public charitable not-for-profit California corporation located in Fairfield, CA (#68-0354961), or its successors in interest,

- The sum of [STATE THE AMOUNT IN DOLLARS WRITTEN IN WORDS] (\$[AMOUNT IN NUMBERS]) (or)
- [STATE A PERCENTAGE OF YOUR ESTATE WRITTEN IN WORDS] (_____% [AMOUNT IN NUMBERS])

of the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition.

The Solano Community Foundation shall administer this gift in accordance with the provisions of the organizational documents and bylaws creating and governing the Solano Community Foundation and any amendments or additions thereto at any time made.

OUTRIGHT GIFT OF RESIDUARY FOR SPECIFIC FUND

I/We, [DONOR NAME] give, devise and bequeath all the rest, residue, and remainder of my property of every kind and description (including lapsed legacies and devises) wherever situate and whether acquired before or after the execution of this Will, to the Solano Community Foundation, a public charitable not-for-profit California corporation located in Fairfield, CA (#68-0354961), or its successors in interest.

The said residuary estate is to be used by the Solano Community Foundation for the purposes set out in that separate [FUND NAME] Fund Agreement between me and the Solano Community Foundation, dated XXX, and executed contemporaneously with this my Last Will and Testament.

The Solano Community Foundation shall administer this gift in accordance with the provisions of the organizational documents and bylaws creating and governing the Solano Community Foundation and any amendments or additions thereto at any time made.

GIFT TO AN EXISTING FUND

I/We, [DONOR NAME] give and bequeath to the Solano Community Foundation, a public charitable not-for-profit California corporation located in Fairfield, CA (EIN #68-0354961), or its successor,

- The sum of [STATE THE AMOUNT IN DOLLARS WRITTEN IN WORDS] (\$[AMOUNT IN NUMBERS]). (or)
- The [PERCENTAGE] of my estate. (or)
- All the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition.

The Solano Community Foundation shall administer this gift in accordance with the provisions of the organizational documents and bylaws creating and governing the Solano Community Foundation and any amendments or additions thereto at any time made.

This gift shall be added to the [NAME OF EXISTING FUND].

***Solano Community Foundation
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Fairfield, CA 94533***

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Disclaimer

The Solano Community Foundation, including its staff and its Board of Directors, is not engaged in rendering legal or tax advisory services. The purpose of this document is to provide accurate information of a general nature. For advice and assistance in specific gift, estate, or financial planning, the services of an attorney or other professional advisor should be obtained.