



## Sample Bequest Language

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A planned gift can be made by naming the Juneau Community Foundation as a beneficiary of a life insurance policy, retirement plan, or IRA. Your client provides a dollar amount or percentage that they wish to go to the Foundation.

They can also make a bequest through their will or trust. Simply name the Juneau Community Foundation (include our EIN number 52-2395867) as a beneficiary in the will or trust and provide either a dollar amount or a percentage of the estate that they wish to donate.

A planned gift may be unrestricted, may be added to an existing fund of the Foundation, or may establish a new fund. If your client already has a will in place, a simple codicil can be written. Or if they already have the Foundation in their will, they can provide us with directions on how they would like the donation to be used.

A simple statement is needed to include a bequest to Juneau Community Foundation in a will or trust:

“I hereby give, devise, and bequeath \_\_\_\_\_ (describe dollar amount, property to be given, or percentage or portion of your residuary estate) to the Juneau Community Foundation (EIN number 52-2395867) a tax exempt organization under IRS Section 501(c) (3). This gift is for the Foundation’s general charitable purposes.”

### Additional Information about Planned Gifts

When considering how to ensure your client’s planned gift is used how they would like, the most important step is understanding what the donor would like to accomplish with their planned gift. We would be happy to work with you and your client to identify the type of fund that would best accomplish their wishes.

For more information, please contact Amy Skilbred at 907-523-5450 or [amy@juneaucf.org](mailto:amy@juneaucf.org)

*The Juneau Community Foundation does not provide financial advice and encourages individuals to work with their professional advisors to determine the financial benefits of any gifting.*