



Sample Estate Planning Language

For Gifts Going to establish/open a new fund at the Community Foundation:

"I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of residuary estate) to the Community Foundation for Palm Beach and Martin Counties, a nonprofit corporation located in West Palm Beach, Florida 33401, tax identification number 23-7181875, to establish a new endowed fund, _____ (The "Fund") (enter the name of the new fund to establish at the Community Foundation, such as the "Smith Family Legacy Fund".) This Fund will support the following charitable purpose(s) _____ (enter names of charities/program or areas of interest, such as after school programs for disadvantaged youth.) I appoint the following individual(s) successor advisors to the Fund _____ (enter names and contact information: email/ mailing address/phone number of advisors to fund).

For Gifts Going into a Fund at the Community Foundation:

"I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of residuary estate) to the Community Foundation for Palm Beach and Martin Counties, a nonprofit corporation located in West Palm Beach, Florida 33401, tax identification number 23-7181875, to benefit the _____ (enter name of fund at the Community Foundation, such as the "Smith Family Legacy Fund".)

For Gifts Going to the Community Foundation without a Previously Established Fund and without opening a new fund:

"I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of residuary estate) to the Community Foundation for Palm Beach and Martin Counties, a nonprofit corporation located in West Palm Beach, Florida 33401, tax identification number 23-7181875, to support the following charitable purpose(s) _____ (enter name of charities/program or area of interest, such as after school programs for disadvantaged youth.)