

Sample Language

Thank you for considering a testamentary gift to MCCF, one of many ways to create a lasting legacy at MCCF. Your testamentary gift can be used directly to support the work that MCCF carries out in McPherson County, or you may establish a permanent fund.

The following are examples of language you may use to name McPherson County Community Foundation as a beneficiary of your will or trust. Please consult your advisor for the exact language to use in your estate plan.

1. Gift to an Existing MCCF Fund

If you already have a fund at MCCF, you may choose to add to this fund through a gift from your estate.

“I give to the McPherson County Community Foundation, a McPherson County nonprofit corporation, EIN 48-1238797, located in McPherson, Kansas [‘the sum of \$____,’ description of property, or percentage of residue], free of estate or inheritance taxes, to be added to the _____ Fund and administered as a part thereof.”

2. Gifting a Specific Amount of Money

“I give to the McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, and successors and assignees, the sum of \$_____.”

3. Gifting the Remainder of an Estate

“I give to the McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, and successors and assignees, all or ____% of the rest, residue, and remainder of my estate.”

4. Gifting of a Bequest

Option #1: “My bequest shall be used to establish a Donor Advised Fund with the following individual(s) as fund advisors: _____, _____, and _____.”

Option #2: “My bequest shall be used to establish a fund devoted to the following cause or issue: _____.”

Option #3 “My bequest shall be used to establish a fund to support the following Section 501

(c)(3) public charity(ies) _____.”

Option #4: “My bequest shall be used to establish a Scholarship Fund to support scholarships [at the] _____ School, for a special area of study, or in recognition of academic achievement or other qualities].”

Option #5: “My bequest shall be used to support the unrestricted Community Endowment Fund of the McPherson County Community Foundation.”

5. **Gift of a percentage of an estate**

“I give to the McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, ____ percent of my estate, free of estate or inheritance taxes, to be used as its board of directors determines necessary or desirable to further its objectives and purposes.”

6. **Gift of a Specific bequest**

Unrestricted gift

“I give to The McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, [‘the sum of \$_____,’ or description of property], free of estate or inheritance taxes, to be used as its board of directors determines necessary or desirable to further its objectives and purposes.”

Restricted gift

“I give to The McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, [‘the sum of \$_____,’ description of property, or percentage of residue], free of estate or inheritance taxes, to be used for [description of purpose].”

Residual gift

A residual gift means that you choose to grant out specific gifts to other beneficiaries and whatever is left after these gifts have been distributed will go to MCCF.

“I give, devise and bequeath to the McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, all the rest and residue of my estate, including real and personal property to be used as its board of directors determines necessary or desirable to further its objectives and purposes.”

Contingent bequest

A contingent bequest means that MCCF will receive a gift from your estate only if the primary named beneficiary is unable or unwilling to accept the gift.

“In the event that all of the beneficiaries named herein predecease me or are otherwise ineligible to receive a distribution from my estate, I give, devise and bequeath [interest] to the McPherson County Community Foundation, a nonprofit corporation of the State of Kansas, EIN 48-1238797 located in McPherson, Kansas, to be used as its board of directors determines necessary or desirable to further its objectives and purposes.”