



Sample Bequest Language

We'd love to connect! The language below is here to help you and your estate planner. Meeting with us ensures that we fully understand and honor your wishes and allows us to thank you.

If you'd like to discuss your gift with Community Foundation staff, consider using this language:

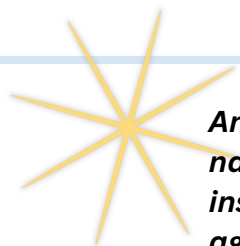
I give to Community Foundation for Mason County, an affiliate of the Community Foundation for Muskegon County, a Michigan nonprofit corporation (EIN 38-6114135), [specific property, %, or \$], with the request that such funds would be used for purposes I may have from time to time recommended to the Community Foundation in writing during my lifetime.

This approach lets you support multiple causes and easily update your wishes without revising your will or trust. We document your gift intentions for your gift in an "Estate Plan Distribution Agreement," which you can adjust anytime with us. It also allows us to thank you in advance and invite you to our Legacy Circle.

If you prefer not to meet with Community Foundation staff to discuss your eventual gift, the following language is recommended:

I give to Community Foundation for Mason County, an affiliate of the Community Foundation for Muskegon County, a Michigan nonprofit corporation (EIN 38-6114135), [specific property, %, or \$], to be held, administered, and used by its Board of Trustees for support of its grantmaking and programming in the areas of [greatest need and opportunity].

Your "greatest need and opportunity" gift will be a lasting resource, used where it's needed most in our community each year – forever. If you'd like to focus on a more specific area, your gift can support education, the arts, social justice and equity, health and human services, environmental causes, and more. Professional advisors with questions about client gifts can contact us for more information while keeping client anonymity.*



Another easy way to leave a legacy and become a member of the Legacy Circle is by naming the Community Foundation as a beneficiary on your retirement account or life insurance policy. To do this, simply reach out to your account custodian or insurance agent and ask them to update your beneficiary designation. You can add the Community Foundation for Mason County (EIN 38-6114135) as a full or partial beneficiary. Once you've made this change, please let us know so we can thank you and document how you'd like your future gift to make an impact.