

Including the Community Foundation of Dunn County in Your Will/Estate Plan



After providing for your family and loved ones, you may want to provide for a cause close to your heart by leaving a bequest in your estate plans to The Community Foundation of Dunn County. Charitable bequests honor the values and passions you held during your lifetime while providing for the future of your community and the causes you love.

Charitable bequests are eligible for tax receipts and the resulting tax credits may significantly reduce your tax payable in the final year of your life, in addition to tax payable by your estate. The Community Foundation will not be taxed on any bequests made to it.

A bequest can be for a specific dollar amount, a percentage of an estate, all or part of the residue of an estate, or may be specified (stocks, IRA, annuity, life insurance policy, real estate, precious metals, and more). You can also name The Community Foundation as a contingent beneficiary in the event someone named in your estate plan is no longer living.

It's easy! To support your fund or another charitable organization through to The Community Foundation, simply include the right words in your will.

Flip this document over for example wording you can use in your will/estate plan.

If you'd like to discuss your estate plans with us, please visit our office or call us.

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Sample Wording for Your Will/Estate Plan

For an Undesignated / Community Fund Gift

I give The Community Foundation of Dunn County the sum of \$ ____ or ____% or the residue of my estate to establish the _____ Fund. It is my wish that this gift be held in perpetuity and that the annual grantmaking therefrom as determined by the Distribution and Spending Policy of The Foundation shall be used for general purposes at the discretion of The Foundation's Directors.

For a Designated Gift

I give The Community Foundation of Dunn County the sum of \$ ____ or ____% or the residue of my estate to establish the _____ Fund.

It is my wish that this gift be held in perpetuity and that the annual grantmaking therefrom as determined by the Spending Policy of The Community Foundation shall be devoted to (area of specific interest such as youth, or education, an established agency endowment fund or a specific charity).

**Specified assets like stocks, an IRA, annuity, life insurance policy, real estate, precious metals, and more also apply.*

NOTE TO READER: *The purpose of this publication is to provide general information, not to render legal advice. In addition any changes in the tax structure may effect the examples listed in this information. Please consult your lawyer or professional advisor when planning your gift .*