

Types of Funds

Community Fund

You allow the Foundation to identify and respond to ever-changing needs. The Grants Committee with its in-depth knowledge of the community can focus your dollars on creative and effective grants.

Designated Fund

You select the specific institution(s) to receive grants from your fund. The income will provide support forever, in good times and bad.

Field of Interest Fund

You decide the area of need you wish to support. For example, a fund may support youth, the arts, or education. The Grants Committee will recommend grants to our Board of Trustees which will impact that field of interest.

Scholarship Fund

You may set up a scholarship fund and establish criteria for awarding scholarships.

Community Foundation of Tampa Bay Operating Fund

These funds support the operations of the Community Foundation of Tampa Bay helping to keep our overhead among the lowest in our industry. With this support the Foundation is able to promote philanthropy and ensure the stability of a permanent resource that will help serve local needs forever.

The Legacy Society honors people who have advised us of their plans to give a gift to the Community Foundation in the future. Their names appear in the Foundation's annual reports.

Anonymity is assured when requested.



For good. For ever.®

Divisions of the Community Foundation of Tampa Bay

**Community Foundation of
Greater Sun City Center**
813.633.6677



**Community Foundation of
Pasco County**
727.846.1921 1.866.88PASCO



**Community Foundation of
Greater St. Petersburg**
727.456.0485



**Community Foundation of
Hernando County**
352.684.8582

For more information contact:
Community Foundation of Tampa Bay
550 North Reo Street, Suite 301
Tampa, Florida 33609
(813) 282-1975
www.cftampabay.org



Confirmed in Compliance With National Standards
For U.S. Community Foundations

State of Florida Disclaimer: **The Community Foundation of Tampa Bay, Inc.** meets all requirements specified by the Florida Solicitation of Contributions Act. A copy of our official registration and financial information may be obtained from the Division of Consumer Services by calling 800.435.7352 within the state. Registration does not imply endorsement, approval, or recommendation by the state. One hundred percent (100%) of each contribution is received by the Community Foundation. Department of Agriculture & Consumer Services number SC-00793.

11.2009

Define your
legacy...

For good.
For ever.



For good. For ever.®

If the gift is being made through a Donor's trust, the following language may be used:

Percentage of trust principal:

"The Trustee shall distribute _____ percent (_____%) of the then principal of the trust to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609."

Contingent beneficiary of trust:

"If, at the death of the Grantor or at any time after the death of the Grantor, there is no person in being qualified to receive the principal of the Trust or the benefits thereof under the foregoing provisions of the trust, then such trust, or the portion thereof with respect to which a total failure of qualified recipients has occurred, shall be distributed to the Community Foundation of Tampa Bay, its successor or successors."

Specific dollar amount from trust:

"The Trustee shall distribute the sum of _____ Dollars (\$_____) to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609."

Residual balance of the trust:

"After making provisions for or making any payment pursuant to the provisions above, the Trustee shall distribute the remaining principal of the trust to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609."

If the gift is being made through a Donor's will, the following language may be used:

Specific dollar amount or gift of specific property:

"I give, devise and bequeath to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609, [the sum of _____ Dollars (\$_____)] **AND/OR** [_____ shares of stock in _____ (name of company)] **AND/OR** [my real property located at _____ (address) _____]."

Residual interest in estate:

"I give, devise and bequeath all the rest, residue and remainder of my estate of every kind and character, real, personal and mixed, tangible and intangible, and wherever situate, including any property over which I shall have power of disposition or appointment, to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609."

Contingent interest in estate:

"If, upon my death, there is no person in being qualified to receive an interest in my estate under the foregoing provisions of this Will, then such interest, or the portion thereof with respect to which a total failure of qualified recipients has occurred, shall be distributed to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609."

Percentage of estate:


"I give, devise and bequeath to the Community Foundation of Tampa Bay, its successor or successors, 550 North Reo Street, Suite 301, Tampa, Florida 33609 _____ percent (_____%) of my estate."




You may also designate a specific organization, fund, or charitable cause using the language outlined below.

To make sure the Community Foundation of Tampa Bay clearly understands what group or cause you wish to support, the Community Foundation of Tampa Bay would be pleased to assist in developing the appropriate language for your will or trust.

 **Community Fund:** "to add to the Foundation's unrestricted Community Fund."

 **Designated Funds:** "to establish a fund to support " _____ (name of organization) _____."

 **Field of Interest Funds:** "to establish a fund or add to an existing fund, the purpose of which is to [describe the cause you wish to support]."

 **Operating Fund:** "to be added to the Community Foundation of Tampa Bay's Operating Fund."