



BEQUEST LANGUAGE FOR THE COMMUNITY FOUNDATION OF TAMPA BAY

EIN = 59 - 3001853

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

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

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)] to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."



TRUST LANGUAGE FOR THE COMMUNITY FOUNDATION OF TAMPA BAY

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

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 to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."



OTHER GIFTING OPTIONS

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, and how you might wish to name your fund, Foundation staff would be pleased to assist in developing the appropriate language for your will or trust.

Community Impact Fund:

"to be added to the Foundation's unrestricted Community Impact Fund."

Designated Funds:

"to establish the (NAME OF FUND – which your client can name anything they want), to support " (name of organization) and which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation."

Field of Interest Funds:

"to establish the (NAME OF FUND – *which your client can name anything they want*), which shall be subject to variance power as fully set forth in the Foundation's Bylaws and Articles of Incorporation, or add to an existing fund, the purpose of which is to support [describe the cause or area of interest, e.g., the arts, education, the elderly, homelessness, etc.]."

Operating Fund:

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

Revised 04.28.2014