**WILL AND BEQUEST LANGUAGE**

The following sample language can be used for estate gifts through:

* Wills
* Living Trusts
* Retirement Plans Designations
* Life Insurance Beneficiary Designations
* Contingent provisions in any of the above estate documents

Each individual situation is unique; therefore, these are basic sample provisions. To assist you with your estate plans, the Community Foundation can provide customized sample language for the causes you may wish to support. To request customized language, please contact our development team at 563.588.2700. We do recommend you consult your attorney with regard to any changes to your estate plan.

**Percentage of Estate or Residuary Bequest**

“I give to the Community Foundation of Greater Dubuque, a nonprofit corporation located in Dubuque, IA, an amount equal to \_\_\_\_\_\_ percent of the total value of the assets in my estate (or the residue of my estate), whatever the amount shall be at the time of my death. This gift is for discretionary purposes to meet the highest priority needs of the community as those arise/is to beaded to the [name the existing endowment of the Foundation here].”

*Or*

“I give to the Community Foundation of Greater Dubuque (CFGD), a nonprofit corporation located in Dubuque, IA, all my right title and interest in the following described property: [list property here]. This gift is for discretionary purposes to meet the highest priority needs of the community as those arise/is to be added to the [name the existing endowment of the Foundation here].”

**Specific Bequest**

You may establish an endowment for a specific purpose through your estate by stating, “This gift is to be added to the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fund and used in accordance with the written agreement entered into by me and the Community Foundation of Greater Dubuque during my lifetime.” In this case, we work with you to establish the fund particulars in a separate document that may be amended at any time before the bequest is received. This avoids the necessity of amending estate documents if you change your mind about the purpose of the fund.

**Bequest Provisions for Affiliate Foundation Donors**

All affiliate foundations of CFGD are component funds of CFGD and are thus under its sole legal control. The language above should be amended to state “… to the [name of affiliate community foundation here], an affiliate component fund of the Community Foundation of Greater Dubuque…” Again, please call our office for custom language.

**Tax ID Number of the Community Foundation of Greater Dubuque:** 42-1526614