

Designing Your Client's Legacy

Charitable giving is uniquely rewarding — it provides your clients with the opportunity to maximize tax benefits while supporting the causes they care about. We offer several ways for donors to sustain their families and our community.

Depending on your clients' current needs and hopes for the future, a charitable bequest could fulfill both their philanthropic and tax-planning needs. This is especially true if your client would like to support a particular cause in perpetuity, champion an entire range of needs in Southwestern Indiana, or "just give something back" when the time is right.

Sample Bequest Language

The following types of bequests direct your clients' gift to the Spencer County Community Foundation through the Community Foundation Alliance. Your client may restrict the bequest using language similar to the samples provided in brackets.

Percentage

"I hereby give, devise and bequeath to the Community Foundation Alliance, Inc., on behalf of the Spencer County Community Foundation, ____% of my estate [for the purpose of (description of intended use of the gift)]."

Specific

"I hereby give, devise and bequeath to the Community Foundation Alliance, Inc., on behalf of the Spencer County Community Foundation, (Choose one)

- 1) The sum of \$_____."
 - 2) _____ shares of stock in _____ Company.", or
 - 3) the property described as or commonly known as _____."
- ... [for the purpose of (description of intended use of the gift)].

Residual

"I hereby give, devise and bequeath to the Community Foundation Alliance, Inc., on behalf of the Spencer County Community Foundation, the rest, remainder, and residue of my estate [for the purpose of (description of intended use of the gift)]."

-or-

"I give, devise and bequeath to the Community Foundation Alliance, Inc., on behalf of the Spencer County Community Foundation, ____% [or fractional interest] of the rest, remainder, and residue of my estate [for the purpose of (description of intended use of the gift)]."

Contingent

"In the event that any or all of the named beneficiaries do not survive me, I hereby give the share that otherwise would be his/hers/theirs to the Community Foundation Alliance, Inc., on behalf of the Spencer County Community Foundation [for the purpose of (description of intended use of the gift)]."

There are a variety of ways your clients can carry out a charitable vision through the Spencer County Community Foundation. Please contact us for additional information to tailor the bequest to your client's goals.

Daviess County Community Foundation
Gibson County Community Foundation
Knox County Community Foundation
Perry County Community Foundation
Pike County Community Foundation
Posey County Community Foundation
Spencer County Community Foundation
Vanderburgh Community Foundation
Warrick County Community Foundation



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