



The **COMMUNITY** Foundation  
for Greater New Haven

Are you ready to create your charitable legacy by making a provision in your will for the benefit of our community? The Community Foundation can help. Read below for sample will language, or contact [Sharon](#) or [Liana](#) to discuss the giving options that may be right for your personal circumstances.

### Sample Bequest Language

The usual method to make a bequest to The Community Foundation is as follows: the donor's executor may transfer cash or other assets to The Community Foundation for Greater New Haven, Inc. Donors may also make bequests through The Community Foundation's Trustee Banks. Bequests that are more than \$10,000 can establish a named endowed fund. Bequests of any size can be added to an existing fund of The Community Foundation. The following sample language should be used for the bequest:

Bequests are gifts from your will or personal trust of cash, stock, real estate, or other assets. You can change your bequest any time during your life. Click on the image above to download our informational guide on bequests.

"I give (or bequeath) to The Community Foundation for Greater New Haven, Inc., a nonprofit charitable corporation, for the public, charitable, and education uses and purposes, the following assets: \_\_\_\_\_.

#### **To add to an existing fund at The Community Foundation, the additional following language would be appropriate:**

"This gift will be an addition to The (Fund Name) Fund in accordance with the Certificate of Incorporation and the By-Laws of The Community Foundation for Greater New Haven, Inc."

#### **To establish an unrestricted fund, the additional following language would be appropriate:**

"This gift will create an endowed unrestricted fund for charitable purposes in accordance with the Certificate of Incorporation and the By-Laws of The Community Foundation for Greater New Haven, Inc. It is my desire that this fund be known as The [insert name] Fund. Annual distributions from the fund, as determined in accordance with the spending-rule policies of The Community Foundation for Greater New Haven, shall be used for general charitable purposes."

#### **To establish a designated fund, the additional following language would be appropriate:**

"This gift will create an endowed designated fund for charitable purposes in accordance with the Certificate of Incorporation and the By-Laws of The Community Foundation for Greater New Haven, Inc. It is my desire that this fund be known as The [insert name] Fund. Annual

distributions from the fund, as determined in accordance with the spending-rule policies of The Community Foundation for Greater New Haven, shall be awarded to (name of the particular charitable organization.)”

If more than one organization is to be designated, the language could read as follows:

“Annual distributions from the fund, as determined in accordance with the spending-rule policies of The Community Foundation for Greater New Haven, shall be allocated as follows:

10% to (name of the particular charitable organization)

20% to (name of the particular charitable organization)

70% to (name of the particular charitable organization)”

You may also add the following:

“Should the prior named organization(s) cease to exist, annual distributions will be (select the appropriate phrase below)

“Made to organizations that serve as nearly as possible the same purposes as the prior-named organizations.”

Or

“Made at the discretion of the Board of Directors of The Community Foundation for Greater New Haven, Inc.”

**To establish a preference fund, the additional following language would be appropriate:**

“This gift will create an endowed preference fund for charitable purposes in accordance with the Certificate of Incorporation and the By-Laws of The Community Foundation for Greater New Haven, Inc. It is my desire that this fund be known as The [insert name] Fund. Annual distributions from the fund, as determined in accordance with the spending-rule policies of The Community Foundation for Greater New Haven, shall be used to make grants for the following charitable purposes: (insert general purposes, e.g., youth development programs, elderly services programs, environmental causes, etc.).”

**To establish a scholarship fund (designated), the additional following language would be appropriate:**

“This gift will create an endowed scholarship fund for charitable purposes in accordance with the Certificate of Incorporation and the By-Laws of The Community Foundation for Greater New Haven, Inc. It is my desire that this fund be known as The [insert name] Fund. Annual distributions from the fund, as determined in accordance with the spending-rule policies of The Community Foundation for Greater New Haven, shall be awarded to [name of the particular charitable/educational organization(s)]. Should the prior named organization(s) cease to exist, distribution will be made to [insert preference language].”

## HOW CAN WE HELP?

---

Don't see an appropriate match for your philanthropic goals? Please tell us your thoughts and ideas. We have 93 years of experience in the philanthropic sector and have forged many partnerships with charitably minded people, professional advisors, and nonprofits along the way.



**Sharon Cappetta, CAP®**

*Director of Development*

203-777-7071

[scappetta@cfgnh.org](mailto:scappetta@cfgnh.org)



**Liana Garcia, MS, PMP, CAP®**

*Director of Gift Planning*

203-974-1646

[lgarcia@cfgnh.org](mailto:lgarcia@cfgnh.org)