



Sample Language

Unrestricted Fund

I give and bequeath to The Community Foundation for Northeast Florida, a Florida not-for-profit corporation located in Jacksonville, FL, federal tax identification number 59-6150746 (the "Foundation"), the sum of \$----- [or ---% of the residue of my estate] to be used for the charitable purposes set forth in its Articles of Incorporation. The Community Foundation shall use such gift to create on its books a component fund that shall be known as [name of fund]. The Fund so established is intended to be a permanent endowment, and it shall be administered in accordance with the Foundation's policies regarding such funds, as they may exist or be amended from time to time. The Foundation will make grants from the fund for such purposes as its Board of Trustees from time to time shall determine in their sole discretion.

Field of Interest Fund

I give and bequeath to The Community Foundation for Northeast Florida, a Florida not-for-profit corporation located in Jacksonville, Florida, federal tax identification number 59-6150746 (the "Foundation"), the sum of \$____ [or ____% of the residue of my estate] to be used for the charitable purposes set forth in its Articles of Incorporation. The Foundation shall use the gift to establish on its books a component fund to be known as [fund name]. The Fund so established is intended to be a permanent endowment, and it shall be administered in accordance with the Foundation's policies regarding such funds, as they may exist or be amended from time to time. The Foundation will make grants from the Fund for the purpose of [describe with as much specificity as possible].

Designated Fund

I give and bequeath to The Community Foundation for Northeast Florida, a Florida not-for-profit corporation located in Jacksonville, Florida, federal tax identification number 59-6150746 (the "Foundation"), the sum of \$____ [or ____% of the residue of my estate] to be used for the purposes set forth in its Articles of Incorporation. The Foundation shall use the gift to establish on its books a component fund to be known as [fund name]. The Fund so established shall be administered as a permanent endowment, and it shall be administered in accordance with the Foundation's policies regarding such funds, as they may exist or be amended from time to time. The Foundation shall use the Fund to provide grants annually to [name each organization and the % payable to each if more than one], provided that all such organizations are exempt from taxation under the Internal Revenue Code.

Adding to an Existing Fund

Alternatively, the client may wish to make a bequest to an existing fund. In that case, include the following language:



I give and bequeath to The Community Foundation for Northeast Florida, a Florida not-for-profit corporation located in Jacksonville, Florida, federal Tax identification member 59-6150746 (the "Foundation"), the sum of \$----- [or ---% of the residue of my estate] to be used for the Foundation's charitable purposes. The gift shall be added to and become a part of the [name of fund] and shall be administered in accordance with the document by which the fund was originally created and the Foundation's policies regarding such funds, as they may exist or be amended from time to time.

For more information, contact John Zell at jzell@jaxcf.org or (904) 356-4483.