



MAKE A BEQUEST

A bequest is the most popular type of planned gift, and an easy way to make a lasting difference in your community. By adding a provision to your will or revocable trust, you can make a gift to the Community Foundation or to a fund we hold.

BENEFITS

- Retain your assets during your lifetime.
- No immediate cost to you.
- Make a gift larger than possible during your lifetime.
- Support a cause you care about – forever.
- Potentially, secure significant tax advantages.
- Adjust your bequest if your situation changes.
- Become a member of the Future Society, enjoy its benefits and inspire others.

TYPES OF BEQUESTS

- Give a fixed amount of cash, or specified asset(s).
- Make a **residual bequest** gifting the balance (or a percentage) of your estate remaining after expenses and other bequests.
- Name us as a **contingent beneficiary** to receive a gift if another bequest cannot be fulfilled.
- **Customize beneficiary language** to support your charitable goals.

WHAT CAN I GIVE?

- Cash
- Appreciated securities
- Real estate
- Personal property
- Business interests
- Intellectual property

Some gifts can provide considerable tax advantages. Talk with your legal and financial advisors to learn more.

GET STARTED

Please meet with us before creating a bequest. Together, we can identify how to best support your philanthropic goals and direct your gift.

BEFORE TAKING ACTION, PLEASE CONTACT GIFT PLANNING & STEWARDSHIP MANAGER NANCY TARTAGLIA AT 203.750.3212.

SAMPLE LANGUAGE FOR BEQUESTS

After determining what type of bequest you would like to make, and how you wish to direct your funds, provide your financial and legal advisors with the sample language below.

To make an **unrestricted endowment** to serve the greatest areas of need:

SAMPLE LANGUAGE:

"I give, devise and bequeath to Fairfield County's Community Foundation, a Connecticut non-profit corporation (the "Foundation") located in Norwalk, Connecticut, the following assets: [insert specific assets, dollar amount, percentage, or residuary] to be used or disposed of as the Foundation in its sole discretion deems appropriate."

To direct your gift to an **existing fund** at Fairfield County's Community Foundation:

SAMPLE LANGUAGE:

"I give, devise and bequeath to [Name of the Fund], a component fund of Fairfield County's Community Foundation, a Connecticut non-profit corporation (the "Foundation") located in Norwalk, Connecticut, the following assets: [insert specific assets, dollar amount, percentage, or residuary]."

To create a **new named fund** through Fairfield County's Community Foundation: **AVAILABLE FOR GIFTS OF \$50,000 OR MORE**

SAMPLE LANGUAGE:

"I give, devise and bequeath to Fairfield County's Community Foundation, a Connecticut non-profit corporation (the "Foundation") located in Norwalk, Connecticut, the following assets: [insert specific assets, dollar amount, percentage, or residuary] with the request, as consistent with the Articles of Organization and By-Laws of the Foundation, as amended from time to time, that the funds thus transferred be used to establish a fund, to be known as the _____ [name of Donor Advised Fund]. Distributions from the fund will be made [SELECT ONE: in accordance with the spending policy of the Foundation OR from the income and/or principal] to be used for grantmaking to qualified charitable organizations. While Fairfield County's Community Foundation is given complete discretion in making grants, suggestions may be made to the Foundation's Governing Board by _____ (individuals named by the donor)."