

Sample Bequest Language for Gifts by Will or Trust

To eliminate any possible confusion, you may also wish to include the Community Foundation of the Lowcountry's Federal Tax ID number 57-0756987.

UNRESTRICTED GENERAL LEGACY

"I give to the Community Foundation of the Lowcountry, an amount equal to — percent (— %) of my adjusted gross estate as finally determined for federal tax purposes."

AMOUNT OF GIFT DEPENDENT ON SIZE OF THE ESTATE

"I give to the Community Foundation of the Lowcountry, an amount equal to — percent (— %) of my adjusted gross estate as finally determined for federal tax purposes, or — dollars (\$—), whichever is larger."

GIFT OF RESIDUARY ESTATE

"I give the residue of the property owned by me at the time of my death, real and personal and wherever situated, to the Community Foundation of the Lowcountry."

CONTINGENT GIFT OF RESIDUARY ESTATE

"I give the residue of the property owned by me at my death, real and personal and wherever situated, to my [XXX]—— if [he/she] survives me. If [he/she] does not survive me, I give my residuary estate to the Community Foundation of the Lowcountry"