



*Here for Oregon. Here for Good.*

## **Leaving a Testamentary Gift to OCF**

Thank you for considering a testamentary gift to OCF, one of many ways to create a lasting legacy at OCF. Your testamentary gift can be used directly to support the work that OCF carries out in Oregon, or you may establish a permanent fund. Please consult your regional gift planner for more details on how to customize a charitable fund to meet your goals.

### **Sample Bequest Language**

The following are examples of language you may use to name OCF as a beneficiary of your will or trust. Please consult your advisor for the exact language to use in your estate plan.

#### ***Gift to an Existing OCF Fund***

If you already have a fund at OCF you may choose to add to this fund through a gift from your estate.

"I give to The Oregon Community Foundation, an Oregon nonprofit corporation, EIN 23-7315673, located in Portland, Oregon [**'the sum of \$\_\_\_\_,' description of property, or percentage of residue**], free of estate or inheritance taxes, to be added to the \_\_\_\_\_ Fund and administered as a part thereof."

#### ***Gift of a percentage of an estate***

You may leave a percentage of your estate to OCF.

"I give to The Oregon Community Foundation, an Oregon nonprofit corporation, EIN 23-7315673, located in Portland, Oregon \_\_\_\_ **percent** of my estate, free of estate or inheritance taxes, to be used as its board of directors determines necessary or desirable to further its objectives and purposes."

#### ***Specific bequest***

Naming OCF the beneficiary of a specific amount from your estate is called a specific bequest.

#### ***Unrestricted gift***

"I give to The Oregon Community Foundation, an Oregon nonprofit corporation, EIN 23-7315673, located in Portland, Oregon [**'the sum of \$\_\_\_\_,' or description of property**],

free of estate or inheritance taxes, to be used as its board of directors determines necessary or desirable to further its objectives and purposes.”

#### *Restricted gift*

“I give to The Oregon Community Foundation, an Oregon nonprofit corporation, EIN 23-7315673, located in Portland, Oregon [**‘the sum of \$\_\_\_\_,’ description of property, or percentage of residue**], free of estate or inheritance taxes, to be used for [**description of purpose**].”

#### *Residual gift*

A residual gift means that you choose to grant out specific gifts to other beneficiaries and whatever is left after these gifts have been distributed will go to OCF.

“I give, devise and bequeath to The Oregon Community Foundation, an Oregon nonprofit Corporation, EIN 23-7315673, located in Portland, Oregon, all the rest and residue of my estate, including real and personal property.”

#### *Contingent bequest*

A contingent bequest means that OCF will receive a gift from your estate only if the primary named beneficiary is unable or unwilling to accept the gift.

“In the event that all of the beneficiaries named herein predecease me or are otherwise ineligible to receive a distribution from my estate, I give, devise and bequeath [**interest**] to The Oregon Community Foundation, an Oregon nonprofit Corporation, EIN 23-7315673, located in Portland, Oregon.”

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#### **COOS BAY**

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#### **EUGENE**

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#### **MEDFORD**

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