



## SAMPLE BEQUEST LANGUAGE

This suggested bequest language can assist you and your attorney with a charitable bequest. Please share our contact information with your professional advisors. We are happy to answer their questions.

**How to use this document:** Make a selection from Section 1 indicating the type of asset you wish to leave to charity. Then, use Options A and B to decide to whom the gift is given and how it should be distributed.

### SECTION 1: Description of Assets to be Given

#### Bequest of a Specific Dollar Amount

- I/we hereby give, devise and bequeath \$\_\_\_\_\_ to...

#### Bequest of Specific Real Estate

- I/we hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at *ADDRESS OR DESCRIPTION OF PROPERTY* to ...

#### Bequest of a Percentage of the Total Estate

- I/we hereby give, devise and bequeath \_\_\_\_ percent of my/our total estate, determined as of the date of my death, to ...

#### Bequest of a Percentage of the Residue and Remainder of the Estate

- I/we hereby give, devise and bequeath \_\_\_\_ percent of the rest, residue and remainder of my/our estate, determined as of the date of my death, to ...

### SECTION 2: Statement of Beneficiary

Use **Option A** if you wish to make an outright gift to your organization of choice.

Use **Option B** if you wish to make a gift that will be endowed, managed by the Foundation and distributed annually to your organization of choice.

#### A. Outright/Direct Gift

##### Diocese of San Jose, Parish, and/or Catholic Elementary Schools

- ...to The Roman Catholic Bishop of San Jose, a corporation sole. (For a gift to a parish or school add the following: "For the benefit of \_\_\_\_\_." )  
*[parish/school name]*

Located at 1150 N. First St. Suite 100, San Jose, CA, 95112, Federal Tax ID #94-2734503. This gift is designated for \_\_\_\_\_.

*(e.g. "unrestricted use," "vocations," "the ILM program," etc.)*



## B. Endowed Gifts (Administered by the Catholic Community Foundation)

### The Catholic Community Foundation will be the beneficiary of endowed gifts

...to The Catholic Community Foundation, a nonprofit organization located at 777 N. First St. Suite 490, San Jose, CA, 95112, Federal Tax ID #83-0400149

#### Gift Designation – Select One

##### *Bequest to general purposes of the Foundation*

- My/our gift(s) will be for the general use and purpose of the Catholic Community Foundation.

##### *Bequest to an already established fund*

- My/our gift(s) will be added to the \_\_\_\_\_ fund, a component  
(name of existing fund)

fund of the Catholic Community Foundation, of which distribution and spending policies are already provided. If, in the judgment of the Board of Directors of the Catholic Community Foundation it is impossible to administer this bequest because either the designated beneficiary ceases to exist or performs in a manner not in keeping with Catholic Social teaching, the distribution from this endowment must be used in the best manner to support the spirit of this gift.

##### *Bequest to a newly established fund (please contact the Foundation ahead of time)*

- My/our gift(s) will be used to create the \_\_\_\_\_ fund, a component  
(name of new fund)

fund of the Catholic Community Foundation.

The purpose of this fund is to \_\_\_\_\_

\_\_\_\_\_. If, in the judgment of the Board of Directors of the Catholic Community Foundation it is impossible to administer this bequest because either the designated beneficiary ceases to exist or performs in a manner not in keeping with Catholic Social teaching, the distribution from this endowment must be used in the best manner to support the spirit of this gift. *Please contact the Foundation ahead of time, as we reserve the right to be unable to administer some funds, or may have minimum gift requirements for new funds.*