



4950 Murphy Canyon Road
San Diego, CA 92123
(858) 279-2740 tel
(858) 279-6105 fax
www.jcfsandiego.org

Sample Bequest Wording

Please note:

To coordinate all aspects of a donor's charitable plan, the Jewish Community Foundation of San Diego uses an endowment fund agreement. This simple document specifies the funding vehicles and stipulates how the endowment fund will distribute dollars to the charitable beneficiaries. Therefore, a donor's will or trust can simply name the Jewish Community Foundation as beneficiary of the bequest; the endowment fund then directs the flow of funds in perpetuity. Below please find examples of sample bequest wording that may be used for wills and trusts.

Please consult your attorney in connection with any changes to your estate plan. The Jewish Community Foundation cannot offer legal advice.

[Sample Bequest Language for Wills](#) (link below to wills)

[Sample Bequest Language for Living Trusts](#) (link below to living trusts)

Sample Bequest Language for Wills:

Outright Bequest

I give [cash of \$_____] or [specified property] to the Jewish Community Foundation of San Diego (TIN 95-2504044), to be used for its general purposes.

Gift for the Foundation's unrestricted use

I give [cash of \$_____] or [specified property] to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be held and administered as part of the Foundation's community Fund with distributions to be made as part of the Foundation's annual grants process. Distributions shall be made annually in accordance with the Foundation's policies and guidelines.

Gift to a Field of Interest Fund

I give [cash of \$_____] or [specified property] to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be held and administered by the Foundation as the [name of fund] Endowment Fund. Distributions shall be made annually in accordance with the Foundation's policies and guidelines. Distributions shall be for the following charitable purpose(s):

Example:

- *Programs to assist Jewish children*
- *Immigration Absorption Centers in Israel*
- *Outreach to Interfaith couples*

subject to the right of the Board of Directors of the Foundation to alter the foregoing designations in the event that any or all of them shall, by reason of changed conditions, become impossible of fulfillment, impracticable or undesirable as determined by the Foundation's Board of Directors.

Gift to Restricted Endowment Fund for the Benefit of Individual Charities

I give [cash of \$_____] or [specified property] to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be held and administered by the Foundation as a restricted fund for the benefit of the following organizations:

Examples:

- *United Jewish Federation of San Diego County*
- *Beth David Synagogue*
- *Organizations such as: Agency for Jewish Education; Hillel of San Diego; Jewish Family Service; Lawrence Family Jewish Community Center JACOBS FAMILY CAMPUS; San Diego Hebrew Homes; San Diego Jewish Academy; Soille San Diego Hebrew Day School*

subject to the right of the Board of Directors of the Foundation to alter the foregoing designations in the event that any or all of them shall, by reason of changed conditions, become impossible of fulfillment, impracticable or undesirable as determined by the Foundation's Board of Directors. Distributions shall be made annually in accordance with the Foundation's policies and guidelines.

Sample Bequest Language for Living Trusts:

Outright Bequest

Upon the death of *[the Trustor(s)]* _____ *[cash the sum of \$ _____]* or *[describe gift: _____]* shall be distributed to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be used for its general purposes.

Gift for the Foundation's unrestricted use

Upon the death of *[the Trustor(s)]* _____ *[cash the sum of \$ _____]* or *[describe gift: _____]* shall be distributed to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be held and administered as part of the Foundation's community Fund with distributions to be made as part of the Foundation's annual grants process. Distributions shall be made annually in accordance with the Foundation's policies and guidelines.

Gift to a Field of Interest Fund

Upon the death of *[the Trustor(s)]* _____ *[cash the sum of \$ _____]* or *[describe gift: _____]* shall be distributed to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be held and administered by the Foundation as the *[name of fund]* Endowment Fund. Distributions shall be made annually in accordance with the Foundation's policies and guidelines. Distributions shall be for the following charitable purpose(s):

Example:

- *Programs to assist Jewish children*
- *Immigration Absorption Centers in Israel*
- *Outreach to Interfaith couples*

subject to the right of the Board of Directors of the Foundation to alter the foregoing designations in the event that any or all of them shall, by reason of changed conditions, become impossible of fulfillment, impracticable or undesirable as determined by the Foundation's Board of Directors.

Gift to Restricted Endowment Fund for the Benefit of Individual Charities

Upon the death of *[the Trustor(s)]* _____ *[cash the sum of \$ _____]* or *[describe gift: _____]* shall be distributed to the Jewish Community Foundation of San Diego (TIN 95-2504044) to be held and administered by the Foundation as a restricted fund for the benefit of the following organizations:

Examples:

- *United Jewish Federation of San Diego County*
- *Beth David Synagogue*
- *Organizations such as: Agency for Jewish Education; Hillel of San Diego; Jewish Family Service; Lawrence Family Jewish Community Center JACOBS FAMILY CAMPUS; San Diego Hebrew Homes; San Diego Jewish Academy; Soille San Diego Hebrew Day School*

•
subject to the right of the Board of Directors of the Foundation to alter the foregoing designations in the event that any or all of them shall, by reason of changed conditions, become impossible of fulfillment, impracticable or undesirable as determined by the Foundation's Board of Directors. Distributions shall be made annually in accordance with the Foundation's policies and guidelines.