



SAMPLES AND CONSIDERATIONS

GIFT PLANNING LANGUAGE

GIFT INSTRUMENT	SAMPLE LANGUAGE	CONSIDERATIONS
Direct bequest or distribution	I give/The trustee shall distribute ____ [e.g., % of estate, residuary estate, dollar amount, specific property, entire estate, etc.] to the Arizona Community Foundation, an Arizona nonprofit corporation, Tax ID: 86-0348306.	Sample language presumes unrestricted gift. This language can be adapted for any planned gift to ACF that is intended to be unrestricted. If directed to named fund, add name of fund.
Contingent bequest or distribution	In the event ____ [name of primary beneficiary] shall not survive me, then I give/the trustee shall distribute ____ [e.g., % of estate, residuary estate, dollar amount, specific property, entire estate, etc.] to the Arizona Community Foundation, an Arizona nonprofit corporation, Tax ID: 86-0348306.	Sample language presumes unrestricted gift. If directed to named fund, add name of fund.
Bequest in a will or distribution from a trust to create or add to a fund(s)	I give/The trustee shall distribute ____ [e.g., % of estate, residuary estate, dollar amount, specific property, entire estate, etc.] to the Arizona Community Foundation, an Arizona nonprofit corporation, Tax ID: 86-0348306. This gift/distribution shall be administered in accordance with the terms of the ____ [donor name(s)] Legacy Gift Agreement with ACF. In the event that I/the trustor(s) fail(s) to execute such agreement, this gift/distribution shall be used for general and charitable purposes as ACF's Board of Directors shall determine, in its sole discretion, as set forth in the Bylaws of the Arizona Community Foundation.	A corresponding ACF Legacy Gift Agreement should be completed in conjunction with gift documentation. A donor may update their ACF Legacy Gift Agreement throughout their lifetime at no cost.
Beneficiary designation	The Arizona Community Foundation, an Arizona nonprofit corporation, Tax ID: 86-0348306, shall be administered in accordance with the terms of the ____ [donor name(s)] Legacy Gift Agreement with ACF. In the event that I fail to execute such agreement, this gift shall be used for general and charitable purposes as ACF's Board of Directors shall determine, in its sole discretion, as set forth in the Bylaws of the Arizona Community Foundation.	If the assets are not owned by the donor's revocable trust, this instrument may be used to transfer ownership. Examples include: bank, brokerage, retirement, or mutual fund accounts; life insurance policies; savings bonds; commercial annuities; and real estate (beneficiary deed). A corresponding ACF Legacy Gift Agreement should be completed in conjunction with gift documentation. A donor may update their ACF Legacy Gift Agreement throughout their lifetime at no cost.
Gift instruments with limited space for gift planning language	The Arizona Community Foundation, Tax ID: 86-0348306.	Even if no direct reference exists in a gift instrument to a donor's fund agreement, such agreement to ACF will be honored and may be updated throughout the donor's lifetime at no cost.

For more information, please call the Arizona Community Foundation at 602.381.1400.



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Disclaimer: The information above is for educational purposes only and should not be considered legal or tax advice. Be sure to consult with your tax and legal advisors for professional advice based on your specific circumstances.

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