

## **How to Leave a Bequest to the Eau Claire Community Foundation**

The Eau Claire Community Foundation will be happy to assist you and your attorney to design and implement an estate plan tailored to your wishes.

A bequest allows the donor to leave the Eau Claire Community Foundation a specific dollar amount, a percentage of his or her estate, or a conditional bequest. It is the easiest and most popular way for donors to make a future commitment.

### **Specific Bequests**

"I give and bequeath \$\_\_\_\_ to the Eau Claire Community Foundation, 306 South Barstow Street, Suite 104, Eau Claire, WI 54701, a State of Wisconsin Corporation, to support its giving purposes."

### **Percentage Bequests**

"I give and bequeath \_\_\_\_% of my residual estate to the Eau Claire Community Foundation, 306 South Barstow Street, Suite 104, Eau Claire, WI 54701, a State of Wisconsin Corporation, to support its giving purposes."

### **Restricted Bequests**

"I give to the Eau Claire Community Foundation, 306 South Barstow Street, Suite 104, Eau Claire, WI 54701, a State of Wisconsin Corporation, the sum of (or property herein described), to be used for \_\_\_\_\_ purposes. At any time, however, in the event the original purpose of the gift no longer exists as determined by the board of directors, the board shall re-direct the proceeds of this gift to another purpose as determined by the board."

### **Honorariums and Memorials**

To remember a loved one with a memorial or honor someone with an honorarium to the Eau Claire Community Foundation, please contact the Foundation at (715) 552-3801 for assistance.

### **Assistance**

The Eau Claire Community Foundation will make every effort to assist you in determining a giving plan that benefits both you and the Eau Claire Community. Should you designate a deferred gift to the Eau Claire Community Foundation, you will be recognized within our Legacy Society. Please feel free to contact Sue Bornick, Executive Director, at (715) 552-3801 for assistance.

We recommend anyone using these materials to always retain the services of legal, accounting, tax and other professional advisors to assist you in your estate and financial planning.

*\*This information contained above is not legal advice. For legal advice please consult your attorney.*