

The following language is suitable for inclusion in the will of a donor who wishes to leave a bequest to the Hamilton Community Foundation:

Language for a Percentage Bequest

"I give, devise and bequeath to the Hamilton Community Foundation, Inc., a non-profit public benefit corporation of the State of Ohio, currently located at 319 N. Third Street, Hamilton, OH, with federal tax ID 31-6038277, and its successors and assignees, _____ % of my estate, to be used as the Board of Trustees, in its sole discretion, determines."

Language for a Residual Bequest

"I give, devise and bequeath to the Hamilton Community Foundation, Inc., a non-profit public benefit corporation of the State of Ohio, currently located at 319 N. Third Street, Hamilton, OH, with federal tax ID 31-6038277, and its successors and assignees, all the residue of my estate, including real and personal property, to be used as the Board of Trustees, in its sole discretion, determines."

If the amount of the devise meets the minimum contribution requirements of the Hamilton Community Foundation (\$5,000), the donor may create a separately identifiable fund by name and purpose by adding language from one of the four options that follow.

Named Fund/Unrestricted Purpose

"This devise will be used to establish a component fund to be known as the _____ Fund. I direct that the amount of the Fund that is available according to the Foundation's spending policy be used for _____ (specify charitable purpose—for example, "the care of the homeless" or "underprivileged children")."

Designated Fund

This devise will be used to establish a component fund to be known as the _____ Fund. I direct that the amount of the Fund that is available according to the Foundation's spending policy be used to support _____ (insert name of particular charitable agency to be supported—for example, "the ABC Church" or "the ABC School District")."

Donor Advised Fund

This devise will be used to establish a component fund to be known as the _____ Fund. I direct that an Advisory Committee consisting of _____, _____, and _____ may make written suggestions from time to time to the Hamilton Community Foundation Board of Trustees concerning grants from the Fund, provided the proposed grant is in furtherance of the general purposes of the Community Foundation. I recognize that these recommendations may be accepted or rejected, in whole or in part, by the governing board in its sole discretion.

Distribution from Principal

If the donor agrees to permit the governing board to invade principal in unusual circumstances, the following language should be added: It is my intention that the distributions from the Fund will ordinarily be made from the fund's investment return. When extraordinary circumstances exist, however, the governing board may authorize distributions from the principal of the Fund.