

# Bequest



## These are for individuals who:

- Want a simple way to leave a legacy from their estate.
- May not be able to make a charitable gift at this time.

Contact Us:

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## A Bequest

If you are not able to make a gift to charity at this time, but eventually want to leave some or all of your estate to serve the charitable needs of Vermont, you might consider including the Community Foundation in your will.

Making a bequest to the Foundation is easy, and you can decide to do it at any age by adding to an existing will or drafting a new one.

You can choose to give a stated dollar amount, a specific property, a percentage of your estate, the remainder after distributions to other beneficiaries, or you can make your gift contingent on certain events.

Many donors establish funds during their lifetimes, add to them as circumstances allow, and then provide for an addition to their funds at the time of their death.

As an alternative to amending your current will, consider naming the Vermont Community Foundation a beneficiary of your retirement plan. Simply contact your plan administrator for a change of beneficiary form, and designate the Foundation for a percentage of the assets which remain in the plan at your death.

## How It Works

- You include the Vermont Community Foundation in your will as a bequest. We can help you and your attorney with recommended language.
- You determine the type of fund you would like to establish with your gift. For example, a bequest can be unrestricted or set aside for a specific field of interest.
- Upon your death, the fund type you determined is established in your name, the name of your family or business, or in honor of a person or organization chosen by you.
- Your gift is fully deductible from any estate taxes.
- We handle all the administrative details and issue grants to charities in the name of the fund you establish. If you prefer, grants can be made anonymously.