

**Memorandum of Donor Intent**

Memorandum of Understanding

Thank you for choosing to include Jefferson Community Foundation in your estate plans. We are honored to assist you in investing your generosity and capacity to make a positive difference for Jefferson County. This memorandum, while not a legally binding document, is meant to document your wishes to include Jefferson Community Foundation in your estate plans. Information contained in this document will remain confidential.

**DONOR(S) CONTACT INFORMATION**

Name(s)

Click or tap here to enter text.

Mailing Address [ ]  Home [ ]  Business

Click or tap here to enter text.

City State Zip

Click or tap here to enter text. Click or tap here to enter text. Click or tap here to enter text.

Home Phone Mobile Phone Business Phone

Click or tap here to enter text. Click or tap here to enter text.

Email #1 Email #2

Click or tap here to enter text.

Donor(s) Date(s) of Birth

RECOGNITION1 *Your commitment to make a gift by bequest to Jefferson Community Foundation makes you a member of the Jefferson Legacy Society, an association that honors and recognizes the generosity and vision of donors who have made a commitment to our community through the lasting impact of a planned gift.*

[ ]  I/we would like to be listed in the Legacy Society as follows: Click or tap here to enter text.

[ ]  Please keep this legacy gift anonymous.

IT IS MY/OUR INTENT TO:

[ ]  CREATE A NEW FUND: [ ]  Endowed [ ]  Non-Endowed

 Fund Name: Click or tap here to enter text.

[ ]  ADD TO AN EXISTING FUND:

 Fund Name: Click or tap here to enter text.

[ ]  MAKE A GENERAL OPERATING DONATION

1Please see page 5 for suggested bequest and estate language to include in a will.

I/WE WOULD LIKE THE DISTRIBUTIONS FROM THIS FUND TO SUPPORT:

[ ]  Click or tap here to enter text. % to support the following 501 (c)3 nonprofit(s) or religious entities:

Click or tap here to enter text.

[ ]  Click or tap here to enter text. % to support the following areas of interest: Click or tap here to enter text.

[ ]  Click or tap here to enter text. % to be used for grantmaking at the discretion of Jefferson Community Foundation to create the greatest impact in our community by supporting its most compelling needs and opportunities.

[ ]  Click or tap here to enter text. % to be used to support Jefferson Community Foundation’s operations which support its work in the community to address important issues and initiatives.

Please note any special instructions related to the fund:

Click or tap here to enter text.

In the event that an organization(s) listed above is no longer in existence, then I/We would like the Jefferson Community Foundation to:

[ ]  Identify another organization that closely aligns with the original issue area addressed and determine the best distribution strategy to support that cause.

[ ]  Allocate the amount available for spending to be used at Jefferson Community Foundation’s discretion to support the community’s most compelling needs and opportunities.

**METHOD OF GIVING**

I/we have included the Jefferson Community Foundation in a bequest by designating

[ ]  A specific amount of my/our estate

[ ]  A specific percentage of my/our estate

[ ]  The remainder of my/our estate

 I/we have included the Jefferson Community Foundation as a beneficiary of:

[ ]  My/our 401(k), 403(b), IRA or other tax-deferred retirement plan

[ ]  My/our life insurance policy

 I/we have included Jefferson Community Foundation in my/our Estate Plan in another way.

Please specify: Click or tap here to enter text.

 The approximate value of my/our intended gift is: $Click or tap here to enter text.

[ ]  I/We wish to keep the value of my/our gift private at this time.

This Memorandum of Donor Intent is consistent with current Jefferson Community Foundation policies and procedures, factors such as the required minimum amount of $10,000 for a permanent named fund, and other administrative policies and procedures may be different at the time My/Our gift is received. If the amount generated fails to meet the minimum amount to establish a Fund, I/We would like the Board of Directors to:

[ ]  Allocate the gift to be used at Jefferson Community Foundation’s discretion, to create the greatest impact in our community by supporting its most compelling needs and opportunities.

[ ]  Combine the funds with an existing fund whose purposes most closely accomplish my/our intent.

[ ]  Combine the funds with the currently existing fund: Click or tap here to enter text.

*If no preference is indicated, funds will be used for grantmaking or operations of
 Jefferson Community Foundation.*

Please attach a description or a copy of the instructions found in your will or other document pertinent
to Jefferson Community Foundation.

SIGNED BY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 PRINTED NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This agreement is NOT legally binding.

**ADDENDUM**

SUGGESTED BEQUEST AND ESTATE LANGUAGE TO INCLUDE IN YOUR WILL:

FOR BEQUESTS TO ESTABLISH A FUND:

I bequeath to Jefferson Community Foundation, a Washington

nonprofit organization, $\_\_\_\_\_\_\_\_\_\_\_ OR \_\_\_\_\_\_\_\_\_\_\_\_\_% of my estate

[OR the remainder of my estate] to establish a fund to be known as the

 Click or tap here to enter text. Fund.

I direct that the funds be used as described in the separate Memorandum of Donor Intent filed with Jefferson Community Foundation.

FOR BEQUESTS TO FUNDS PREVIOUSLY ESTABLISHED:

I bequeath:

(describe assets which are the subject of the bequest (for example, a stated sum $\_\_\_\_\_\_\_\_\_\_\_ OR a\_\_\_\_\_\_\_\_\_\_\_\_\_% percentage of the estate OR the remainder of the estate) to Jefferson Community Foundation, a Washington nonprofit corporation, to be added to and become a part of The Click or tap here to enter text. Fund, and to be held and administered subject to and in accordance with the provisions of the agreement entitled “The Click or tap here to enter text. Fund” entered into by Click or tap here to enter text. and Jefferson Community Foundation on the Click or tap here to enter text. day of Click or tap here to enter text., 20Click or tap here to enter text..