

Private and Confidential - Sample wording for Letter of Wishes

To My Executors, My Family and My Beneficiaries and Any Other Person Whom It May Concern: **(Or you can just address the letter to the Community Foundation):**

I, (name), of (address), wish to state my wishes with respect to my gifts to charity. I appreciate that this Letter imposes no legal obligation upon you but it expresses my wishes to which I hope you will have due regard.

In my Will, I have made provision for a **(you may wish to include details of the gift here)** gift to the Community Foundation serving Tyne & Wear and Northumberland of Philanthropy House, Woodbine Road, Gosforth, Newcastle upon Tyne, NE3 1DD, Registered Charity 700510 for its general charitable purposes.

I request that my gift be used to establish a Fund at the Community Foundation and that the Community Foundation distributes the Fund's income, after the deduction of its standard administrative charges, in accordance with my wishes detailed below.

I request that the Fund be known as the **'Insert Name of Fund'** and I intend the Fund to **(insert one line description of the Fund, ie to support young people's projects in Tyne and Wear, promote independence and choice for older people)**

I would like the Fund to **(insert more detailed information about what the purpose of the fund is, expanding on the above)**

I wish the area of benefit for the Fund to be defined as **(insert geographical area)**.

I wish to provide the following examples of how the Fund might be used; this is to give an idea of the scope of my wishes and is not intended to be exhaustive:

- **Provide three or four examples of the types of projects that would be supported through the fund.**

I would prefer that the Fund not be used to support **(Detail any exclusion to the fund)**.

(For successor advisors)

I wish to appoint the following advisors to the Fund:

- **Insert names**

I understand that the Community Foundation board has the ultimate responsibility for awarding grants and managing funds and in particular, the Board will not normally agree to requests to spend capital from endowments and reserves the right not to award grants if, in the Board's view, the grant is not charitable.

If my appointed advisors are unable or unwilling take on the advisory responsibilities for the Fund, I delegate the decision making powers to the Community Foundation.

(Delegated Decision Making)

I do not wish to appoint any advisors to the Fund and delegate the decision making powers to the Community Foundation.

(Fund less than £1m)

I understand the Community Foundation will operate the Fund, as a named fund for 30 years starting when the gift is received and thereafter the funds will be transferred to the Community Foundation's Thriving Communities Fund.

I understand that if the gift is insufficient to establish the said Fund then the Community Foundation shall apply the gift, at its discretion, to support charitable projects in **(Tyne and Wear and / or Northumberland)**.

I wish to emphasise that this letter represents my wishes as at the date below. It is not my intention to prevent the Community Foundation from exercising its discretion from time to time as it thinks fit to pursue the spirit of my wishes.

Signed _____
(Name of Legator)

Dated _____