

Leaving a Gift to the Community Foundation – sample wording

Leaving a legacy gift to the Community Foundation is one way of helping people in your own community for generations to come. It is a way of leaving something of real and lasting value to local people.

Sample Will Wording:

*I give to the Community Foundation serving Tyne & Wear and Northumberland of
Philanthropy House, Woodbine Road, Gosforth, Newcastle upon Tyne, NE3 1DD,
(Registered Charity no 700510)*

the sum of £XX

or

[state fraction or percentage] of the residue of my estate

or

the sum of £XX linked to the Retail Price Index from the date of this Will

or

*[specific shareholding] my shares in XXX or such other shares or stock as may
represent the same at the time of my death as a result of any amalgamation takeover
or reorganisation of the said company*

or

*[general shareholding instruction] all my stocks and shares in any public limited
company*

or

the following items of furniture/jewellery/property (etc.) XXXXX.

*and I declare that the receipt of any of its officers shall be a good discharge to my
Executors/Trustees.*

It is my wish but without imposing any legal obligation that the said gift shall:

*be applied by the Community Foundation for its general charitable purposes at its
discretion*

or, if the donor has a letter of wishes

*be applied by the Community Foundation, in accordance with my wishes, detailed in
the signed Letter of Wishes that accompanies my Will.*

Sample Legacy Wording

or if the donor wishes to specify the purpose(s) to which the gift is to be put

be used by the said charity at its discretion for the benefit of [for example the chronic sick and disabled / the unemployed / youth training / education (etc.)]

and/or if the donor wishes to specify the area (within Tyne & Wear and Northumberland)

in [for example Sunderland / South Tyneside / Northumberland (etc.)]

and / or if the donor wishes to be commemorated or to remember a loved one through the gift

and I request that the said gift shall be known as "the XYZ Fund"

and / or if the donor wishes to support an existing fund at the Community Foundation

be used to support the XYZ Fund at the Community Foundation [e.g. Vital Tyne & Wear Fund / Women's Fund (etc.)], or applied for similar charitable purposes at its discretion.

Sample Codicil wording for legacy to Community Foundation:

I of declare this to be a (first/second/etc) codicil to my will dated I give to Community Foundation serving Tyne & Wear and Northumberland of Philanthropy House, Woodbine Road, Gosforth, Newcastle upon Tyne, NE3 1DD (Registered charity no 700510)

the sum of £XX

or

[state fraction or percentage] of the residue of my estate

or

the sum of £XX linked to the Retail Price Index from the date of this Will

or

[specific shareholding] my shares in XXX or such other shares or stock as may represent the same at the time of my death as a result of any amalgamation takeover or reorganisation of the said company

or

[general shareholding instruction] all my stocks and shares in any public limited company

Sample Legacy Wording

or

the following items of furniture/jewellery/property (etc)

and I declare that the receipt of any of its officers shall be a good discharge to my Executors/Trustees. It is my wish but without imposing a trust that the said gift shall:-

be applied by the Foundation for its general charitable purposes at its discretion

or, if the donor has a letter of wishes

be applied by the Community Foundation, in accordance with my wishes, detailed in the signed Letter of Wishes that accompanies my Will.

or if the donor wishes to specify the purpose(s) to which the gift is to be put

be used by the said charity at its discretion for the benefit of [for example the chronic sick and disabled / the unemployed / youth training / education (etc.)]

and/or if the donor wishes to specify the area (within Tyne & Wear and Northumberland)

in [for example Sunderland / South Tyneside / Northumberland (etc.)]

and / or if the donor wishes to be commemorated or to remember a loved one through the gift

and I request that the said gift shall be known as "the XYZ Fund"

and / or if the donor wishes to support an existing fund at the Community Foundation

be used to support the XYZ Fund at the Community Foundation [e.g. Vital Tyne & Wear Fund / Women's Fund (etc.)], or applied for similar charitable purposes at its discretion.

signed by me thisday of 20.....

Signature:

Signed by:

in our presence and by us in his/hers

Witness:

Witness:

Address:

Address: