

This suggested bequest language can assist you and your attorney with a charitable bequest. Please share our contact information with your professional advisors. We are happy to answer their questions.

**How to use
this document**

Section 1: Indicate the type of asset you wish to leave to charity.

Section 2: Use Options A and B to decide how to distribute the gift and to whom.

SECTION 1: Description of Assets to be Given

Bequest of a Specific Dollar Amount

- I/we hereby give, devise and bequeath \$_____ to...

Bequest of Specific Real Estate

- I/we hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at *ADDRESS OR DESCRIPTION OF PROPERTY* to ...

Bequest of a Percentage of the Total Estate

- I/we hereby give, devise and bequeath ____ percent of my/our total estate, determined as of the date of my/our death, to ...

Bequest of a Percentage of the Residue and Remainder of the Estate

- I/we hereby give, devise and bequeath ____ percent of the rest, residue and remainder of my/our estate, determined as of the date of my death, to ...

SECTION 2: Statement of Beneficiary

Use **Option A** if you wish to make a gift directly to the organization. Use the sample for guidance and fill in the details of the organization you choose.

Use **Option B** if you wish to make a gift that will be endowed, managed by the Foundation and distributed annually to your organization of choice.

A. Outright/Direct Gift to Charity

Gifts to the Diocese of San Jose, Parish, and/or Catholic Elementary Schools

- ...to The Roman Catholic Bishop of San Jose, a corporation sole. (For a gift to a parish or school add the following: "For the benefit of _____." "*[parish/school name]*)

Located at 1150 N. First St. Suite 100, San Jose, CA, 95112, Federal Tax ID #94-2734503. This gift is designated for _____.

(e.g. "unrestricted use," "vocations," "the ILM program," etc.)

**Option A
Example**

We hereby give, devise, and bequeath **5 percent of our total estate**, determined as of the date of our death, to The Roman Catholic Bishop of San Jose, a corporation sole, **for the benefit of Saint Lucy School** located at 76 Kennedy Avenue Campbell, CA 95008, Federal Tax ID #94-2734503. This gift is designated for **general operations**.

B. Gifts Administered by the Catholic Community Foundation

The Catholic Community Foundation

...to The Catholic Community Foundation, a nonprofit organization located at 777 N. First St. Suite 490, San Jose, CA, 95112, Federal Tax ID #83-0400149.

Gift Designation – Select One

The best way for the Foundation to properly administer your gift is to have a **Family Legacy Plan** in place. This is a form you fill out with the help of the Foundation staff. Contact the Foundation for more information.

Bequest to fund a Family Legacy Plan

- My/our gift(s) will be used to fulfill the _____
(name of Family Legacy Plan)

Bequest to an already established fund

- My/our gift(s) will be added to the _____ fund, a component
(name of existing fund)
fund of the Catholic Community Foundation, of which distribution and spending policies are already provided. If, in the judgment of the Board of Directors of the Catholic Community Foundation it is impossible to administer this bequest because either the designated beneficiary ceases to exist or performs in a manner not in keeping with Catholic Social teaching, the distribution from this endowment must be used in the best manner to support the spirit of this gift.

Bequest to a newly established fund (please contact the Foundation ahead of time)

- My/our gift(s) will be used to create the _____ fund, a component
(name of new fund)
fund of the Catholic Community Foundation.
The purpose of this fund is to _____.
If, in the judgment of the Board of Directors of the Catholic Community Foundation it is impossible to administer this bequest because either the designated beneficiary ceases to exist or performs in a manner not in keeping with Catholic Social teaching, the distribution from this endowment must be used in the best manner to support the spirit of this gift.

Please contact the Foundation ahead of time, as we reserve the right to be unable to administer some funds or may have minimum gift requirements for new funds.

Bequest to general purposes of the Foundation

- My/our gift(s) will be for the general use and purpose of the Catholic Community Foundation.

Option B Example

We hereby give, devise, and bequeath all of the **right, title and interest in and to the real estate** located at 123 Church Street, San Jose, CA 95112, to **The Catholic Community Foundation**, a nonprofit organization located at 777 N. First St. Suite 490, San Jose, CA, 95112, Federal Tax ID #83-0400149. Our gift will be added to the **“Carpenter Family Legacy Plan.”**