

Sample Language Permanent Legacy Funds

For clients who wish to establish a permanent Legacy Fund, where annual distributions are limited to the income generated by the Fund, please use one of the paragraphs below.

"I give to the Community Foundation of the Napa Valley, a California nonpr public benefit corporation, (the sum of \$) OR (all my right, title ar	nd
interest in the following described property),
to be used to create a Legacy Fund to be known as theFund,	the
income of which shall be devoted to the support of	_
(name broad field of interest or specific charity or designate the Community	/
Endowment) and so distributed according to the judgment of the Board of	
Directors of the Community Foundation of the Napa Valley."	
b. Residuary Bequest	
"I give to Community Foundation of the Napa Valley, a California nonprofit	public
benefit corporation, the residue of my estate to be used to create a Legacy	
to be known as theFund, the income of which shall be	
devoted to the support of(name	e
broad field of interest or specific charity or designate the Community	•
Endowment) and so distributed according to the judgment of the Board of	
Directors of the Community Foundation of the Napa Valley."	
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c. Proportional Bequest "I give to Community Foundation of the Napa Valley, a California nonprofit	
c. Proportional Bequest "I give to Community Foundation of the Napa Valley, a California nonprofit benefit corporation, (a stated percentage or a fraction of my estate) to be used.	sed to
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*** Please note: Our legal name is Community Foundation of the Napa Valley. In 2007, we filed a DBA with Napa County to conduct business as Napa Valley Community Foundation.



Sample Language Non-permanent Legacy Funds

For clients who wish to establish a non-permanent Legacy Fund, where annual distributions are <u>not</u> limited to the income generated by the Fund, but may include distributions from income as well as principal, please use one of the paragraphs below.

a. Specific Bequest
"I give to the Community Foundation of the Napa Valley, a California nonprofit
public benefit corporation, (the sum of \$) OR (all my right, title and
interest in the following described property),
to be used to create a Legacy Fund to be known as theFund, which
shall be devoted to the support of (name broad field of
interest or specific charity or designate the Community Endowment) and so
distributed over no more thanyears (select a number between 5 and
20) according to the judgment of the Board of Directors of the Community
Foundation of the Napa Valley."
b. Residuary Bequest
"I give to Community Foundation of the Napa Valley, a California nonprofit public
benefit corporation, the residue of my estate to be used to create a Legacy Fund
to be known as theFund, which shall be devoted to the
support of(name broad field of
interest or specific charity or designate the Community Endowment) and so
distributed over no more thanyears (select a number between 5 and
20) according to the judgment of the Board of Directors of the Community
Foundation of the Napa Valley."
c. Proportional Bequest
"I give to Community Foundation of the Napa Valley, a California nonprofit public
benefit corporation, (a stated percentage or a fraction of my estate) to be used to
create a Legacy Fund to be known as the Fund, which shall be
devoted to the support of (name broad
field of interest or specific charity or designate the Community Endowment) and
so distributed over no more thanyears (select a number between 5
and 20) according to the judgment of the Board of Directors of the Community
Foundation of the Napa Valley."

^{***} Please note: Our legal name is Community Foundation of the Napa Valley. In 2007, we filed a DBA with Napa County to conduct business as Napa Valley Community Foundation.