

The following language is provided as a sample to assist you and your professional advisor. We encourage donors to consult with their attorney or estate planning professional to ensure their charitable intentions are accurately reflected in their estate plan.

Already Have a Fund?

If you already have a fund with the Community Foundation of Southwest Indiana, your attorney may reference the exact fund name in your estate documents. The sample language below can be adapted for your existing fund.

Want to Create a New Fund?

If you would like to establish a new charitable fund through your estate plan, our team can help you determine the best option and prepare a fund agreement in advance.

Existing Fund

Use this option if you already have an established fund with the Community Foundation and wish to add to it through your estate plan.

I give, devise, and bequeath \$_____ (or _____% of my estate) to the Community Foundation of Southwest Indiana to be added to the **[Exact Fund Name]**, to be administered in accordance with the current fund agreement.

Create a New Named Fund

Creates a permanent charitable fund in your name or in honor of someone important to you.

I give, devise, and bequeath \$_____ (or _____% of my estate) to the Community Foundation of Southwest Indiana to establish the **[Donor Name]** Fund, to be administered according to a fund agreement executed with the Foundation or, if none exists, pursuant to the Foundation's policies.

General Unrestricted Endowment

Provides flexible support to address the region's greatest needs, both today and in the future.

I give, devise, and bequeath \$_____ (or _____% of my estate, or the residue of my estate) to the Community Foundation of Southwest Indiana, to establish or support an unrestricted charitable endowment that will address the greatest needs and opportunities throughout Southwest Indiana, as determined by the Foundation's Board of Directors.

Designated Fund

Provides ongoing support to one or more specific nonprofit organizations you choose.

I give, devise, and bequeath \$_____ (or _____% of my estate) to the Community Foundation of Southwest Indiana to establish the **[Donor Name]** Designated Fund, benefiting **[Non-Profit Organization Name]**, to be administered according to the Foundation's governing documents and spending policy.

Field of Interest Fund

Supports causes you care about, such as education, health, the arts, or the environment, while allowing the Foundation to recommend grants to the most effective organizations over time.

I give, devise, and bequeath \$_____ (or _____% of my estate) to the Community Foundation of Southwest Indiana to establish the **[Donor Name]** Field of Interest Fund, supporting charitable purposes related to **[education, health, arts, environment, etc.]**, as determined by the Foundation.

Scholarship Fund

Creates a lasting legacy by helping students pursue educational opportunities for years to come.

I give, devise, and bequeath \$_____ (or _____% of my estate) to the Community Foundation of Southwest Indiana to establish the **[Donor Name]** Scholarship Fund, which supports educational opportunities for students who meet the criteria outlined in the fund agreement.

Specific Asset

Allows you to leave assets such as real estate, securities, retirement accounts, or other property instead of cash.

I give my interest in **[specific asset, real estate, securities, retirement account, etc.]** to the Community Foundation of Southwest Indiana for the benefit of **[fund or charitable purpose]**.

Organization Information

- **Legal Name:** Community Foundation of Southwest Indiana, Inc.
- **Federal Tax ID (EIN):** 35-1830262
- **Mailing Address:** 20 NW Third Street, Suite 820, Evansville, IN 47708
- **Phone:** (812) 429-1191
- **Email:** info@cfswi.org
- **Website:** www.cfswi.org

We recommend that you notify the Community Foundation if you include us in your estate plans. While not required, it helps ensure your charitable intentions are clearly understood and gives us the opportunity to recognize your generosity through our Legacy Society, if you choose.

Thank you for considering the Community Foundation of Southwest Indiana in your estate plans. Your legacy will help strengthen our communities and create lasting impact for generations to come.

Questions?

Our team is happy to work with you, your attorney, or your financial advisor to help ensure your charitable intentions are carried out as you envision.