

## Sample Bequest Language

Thank you for considering the **Catholic Community Foundation of Northeast Indiana, Inc.** in your estate plan. Your charitable gift in support of your Catholic faith will make a lasting difference and create a profound impact for generations to come.

The following pages provide sample bequest language to help you and your attorney as you consider your legacy. Before finalizing your bequest, however, you must consult with your attorney to ensure your gift is legally structured in line with your wishes. Additionally, whether you are establishing a new fund or designating an existing one, please contact the Catholic Community Foundation to ensure the correct fund name is used and that your attorney has everything he/she will need.

### 1. Specific Bequest

A specific bequest is a gift of a particular dollar amount, asset, or piece of property.

#### Bequest of a Specific Dollar Amount

"I hereby give, bequeath, and devise the sum of \$ \_\_\_\_\_ to the Catholic Community Foundation of Northeast Indiana, Inc. a nonprofit organization located at 9025 Coldwater Rd., Ste 300, Fort Wayne, IN 46825. This bequest shall be held in the \_\_\_\_\_ Fund to benefit **(your parish, school, or ministry-specific fund)** and shall be used as directed by our fund agreement."

#### \*Bequest of Specific Personal Property

"I hereby give, bequeath, and devise **(description of property)** to the Catholic Community Foundation of Northeast Indiana, Inc. a nonprofit organization located at 9025 Coldwater Rd., Ste 300, Fort Wayne, IN 46825. This bequest shall be held in the \_\_\_\_\_ Fund to benefit **(your parish, school, or ministry-specific fund)** and shall be used as directed by our fund agreement."

#### \*Bequest of Specific Real Estate

"I hereby give, bequeath, and devise all of my right, title, and interest in and to the real estate and fixed improvements (located at \_\_\_\_\_ **address or legally described as** \_\_\_\_\_ **[legal description of real estate]**) to the Catholic Community Foundation of Northeast Indiana, Inc. a nonprofit organization located at 9025 Coldwater Rd., Ste 300, Fort Wayne, IN 46825. This bequest shall be held in the \_\_\_\_\_ fund to benefit **(your parish, school, or ministry-specific fund)** and used as directed by our fund agreement."

\*Gifts of real estate or specific personal property (other than marketable stocks and bonds) require the advance written approval of the Catholic Community Foundation. If you are considering such a bequest, please first contact the Foundation.

## 2. Percentage Bequest

A percentage bequest designates a portion of your estate to the Foundation.

*"I hereby give, bequeath, and devise \_\_\_% of my residuary estate, as determined on the date of my death, to the Catholic Community Foundation of Northeast Indiana, Inc. a nonprofit organization located at 9025 Coldwater Rd., Ste 300, Fort Wayne, IN 46825. This bequest shall be held in the \_\_\_\_\_ Fund to benefit **(your parish, school, or ministry-specific fund)** and used as directed by our fund agreement."*

## 3. Residual Bequest

A residual bequest leaves the remainder of your estate after expenses and specific bequests have been paid and distributed.

*"I hereby give, bequeath, and devise all of my residuary estate to the Catholic Community Foundation of Northeast Indiana, Inc. a nonprofit organization located at 9025 Coldwater Rd., Ste. 300, Fort Wayne, IN 46825. This bequest shall be held in the \_\_\_\_\_ Fund to benefit **(your parish, school, or ministry-specific fund)** and used as directed by our fund agreement."*

## Why the Catholic Community Foundation?

Our mission is to ensure your gift is managed **in accordance with Catholic values**—from investing in alignment with Church teaching to distributing grants that strengthen our parishes, Catholic schools, and ministries. Additionally, we offer flexible giving solutions, including:

- **Endowments** – A powerful way to ensure your generosity supports the Church in perpetuity. When you establish or contribute to an endowment fund, your gift is invested, with a portion of the fund distributed periodically to support the designated parish, school, or ministry. Your gift will provide stable and ongoing financial support—strengthening the Church for generations to come.
- **Donor Advised Funds** – A Donor Advised Fund (DAF) provides a flexible and convenient way to leave a lasting charitable legacy. As a simpler alternative to establishing a private foundation, a DAF allows you and/or your loved ones to periodically recommend grants to Catholic ministries and organizations that align with your values, ensuring your generosity continues to make an impact for years to come.

## Contact Us

We're here to help you plan a bequest that reflects your faith and charitable goals. If you've already included a gift in your estate plan, please let us know—we would love the opportunity to thank you and recognize your generosity by welcoming you to the Magnificat Bequest Society!



**Catholic Community Foundation of Northeast Indiana, Inc.**  
**9025 Coldwater Rd., Ste 300, Fort Wayne, IN 46825**



**260-399-1436**



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\*The information provided here is for general informational purposes only and should not be considered legal advice. Before taking any action based on this information, please consult with a qualified attorney to seek legal advice regarding your specific situation.

