



Sample Language for Bequests by Will or Trust

The suggested language below is provided to assist donors and their attorneys in making a bequest to the Foundation for MetroWest. Bequests that are more than \$10,000 can establish a named endowed fund. Bequests of any size can be added to an existing fund of the Foundation for MetroWest.

To establish an Unrestricted Fund

“I give and bequeath to the Foundation for MetroWest [the Foundation], a non-profit charitable organization, in accordance with the Foundation’s Articles of Organization and By-Laws, the following assets: _____ (state the amount of money or provide a description of property)

“This gift will create an endowed Unrestricted Fund for charitable purposes in accordance with the Articles of Organization and the By-laws of the Foundation for MetroWest. It is my desire that this fund be known as the _____ (insert name) Fund.

Annual distributions from the Fund, as determined in accordance with the spending rule policies of the Foundation for MetroWest, shall be used for general charitable purposes to enhance the quality of life for all of the citizens of the MetroWest region.”

To add to an existing fund at the Foundation for MetroWest

“I give and bequeath to the Foundation for MetroWest [the Foundation], a non-profit charitable organization, in accordance with the Foundation’s Articles of Organization and By-Laws, the following assets: _____ (state the amount of money or provide a description of property).

“This gift will be an addition to the _____ Fund (Fund Name) in accordance with the Articles of Organization and the By-Laws of the Foundation for MetroWest.”

To establish a Designated Fund

“I give and bequeath to the Foundation for MetroWest [the Foundation], a non-profit charitable organization, in accordance with the Foundation’s Articles of Organization and By-Laws, the following assets: _____ (state the amount of money or provide a description of property)

“This gift will create a permanent Designated Fund for charitable purposes in accordance with the Articles of Organization and the By-Laws of the Foundation for MetroWest. It is my desire that this fund be known as the _____ (insert name) Fund.

Annual distributions from the fund, as determined in accordance with the spending rule policies of the Foundation for MetroWest, shall be awarded to _____ (insert name(s) of the particular charitable organization(s).)

The Foundation for MetroWest gives its Board of Directors variance power should ‘circumstances have so changed since the execution of this instrument as to render unnecessary, undesirable, impractical or impossible a literal compliance with the terms of this instrument.’ In all respects the use of the Fund shall be in accordance with the charitable purposes of the Foundation and subject to the approval of the Foundation’s Board of Directors.”

The following language may also be added:

“Should the prior named organization(s) cease to exist, annual distributions will be (select the appropriate phrase below)

made to organizations which serve as nearly as possible the same purposes as the prior-named organization(s).

OR

made at the discretion of the Board of Trustees of the Foundation for MetroWest.”

To establish a Field of Interest Fund

“I give and bequeath to the Foundation for MetroWest [the Foundation], a non-profit charitable organization, in accordance with the Foundation’s Articles of Organization and By-Laws, the following assets: _____ (state the amount of money or provide a description of property).

“This gift will create a permanent Field of Interest Fund for charitable purposes in accordance with the Articles of Organization and the By-Laws of the Foundation for MetroWest. It is my desire that this fund be known as the _____ (insert name) Fund.

Annual distributions from the Fund, as determined in accordance with the spending rule policies of the Foundation for MetroWest, shall be used to make grants for the following charitable purposes: _____ (insert general purposes, e.g., family support, youth development programs, arts and culture, environmental causes, etc.).

“The Foundation for MetroWest gives its Board of Directors variance power should ‘circumstances have so changed since the execution of this instrument as to render unnecessary, undesirable, impractical or impossible a literal compliance with the terms of this instrument.’ In all respects the use of the Fund shall be in accordance with the charitable purposes of the Foundation and subject to the approval of the Foundation’s Board of Directors.”

To establish a Donor Advised Fund

“I give and bequeath to the Foundation for MetroWest [the Foundation], a non-profit charitable organization, in accordance with the Foundation’s Articles of Organization and By-Laws, the following assets: _____ (state the amount of money or provide a description of property).

This gift will create an endowed donor advised fund to be known as the _____ (insert name) Fund. While the Foundation is given complete discretion in making grants, grant suggestions may be made from time to time by the following individuals: _____ (list individuals).

For more information, please call the Foundation for MetroWest at 508.647.2260.