



We are pleased to provide sample bequest language to assist you and your attorney, and we thank you for your interest in leaving a lasting legacy to impact Charlotte County through the Charlotte Community Foundation (CCF).

- **Legal Name:** Charlotte Community Foundation
- **Address:** 227 Sullivan Street, Punta Gorda, Florida 33950
- **Federal Tax Identification Number (EIN):** 65-0455319

There are several ways to provide a testamentary gift through your will or trust:

- **An unrestricted endowment bequest:** This gift supports Charlotte County and its changing needs in perpetuity. Consider, for example, the impact that natural disasters have on the area and how providing general support for the quality of life in Charlotte County could forever impact the community.
- **A restricted endowment bequest:** If your gifts are intended for a specific fund, nonprofit(s), cause or area of interest, we encourage you to consult us on how best to define and carry out your wishes with a non-binding Letter of Intent.

You have complete flexibility to change your bequest at any time.

General Bequest may be worded:

- “I give to the Charlotte Community Foundation, 201 Sullivan St., Punta Gorda, FL 33950, a Florida nonprofit corporation, Federal Tax Identification Number 65-0455319 [insert percentage/amount].”

Specific Bequest of a certain asset from your estate may be worded:

- “I give to the Charlotte Community Foundation, 201 Sullivan St., Punta Gorda, FL 33950, a Florida nonprofit corporation, Federal Tax Identification Number 65-0455319, [insert here a description of the particular property].”

Residuary Bequest, after other bequests and expenses have been paid, may be worded:

- “I give to the Charlotte Community Foundation, 201 Sullivan St., Punta Gorda, FL 33950, a Florida nonprofit corporation, Federal Tax Identification Number 65-0455319, all [or a portion] of the rest, residue and remainder of my estate.”

Contingent Bequest if the person making the will is not survived by certain individuals:

- “If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to the I give to the Charlotte Community Foundation, 201 Sullivan St., Punta Gorda, FL 33950, a Florida nonprofit corporation, Federal Tax Identification Number 65-0455319, [insert here the exact dollar amount, description of property, or percentage of residual estate].”