



## **Minnesota Jewish Community Foundation, LLC Example Language for Gifts**

### **Estate/Bequest**

#### *1. Bequest in Will where fund at MN JCF is Established Prior to Death:*

##### *1. General Purpose Specific Bequest*

I give, devise, bequeath, \_\_\_\_\_ [insert percentage or dollar amount or item of property to be donated] [of my gross estate, but no more than \$ \_\_\_\_\_] to the Minnesota Jewish Community Foundation, LLC (Tax ID number: 41 – 0693866), a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101, or its successor organization, located at 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305; (952) 593-2600. This gift is to be [added to the \_\_\_\_\_ [insert the name of the fund] at the Minnesota Jewish Community Foundation, LLC] or [used as unrestricted gift to support the mission, programs, or services of the Minnesota Jewish Community Foundation, LLC].

##### *2. General Purpose Residuary Bequest*

I give, devise, bequeath, \_\_\_\_\_ (insert % amount) of all the rest, residue and remainder of my estate to Minnesota Jewish Community Foundation, LLC (Tax ID number: 41 – 0693866), a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101, or its successor organization, located at 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305; (952) 593-2600. This gift is to be [added to the \_\_\_\_\_ [insert the name of the fund] at the Minnesota Jewish Community Foundation, LLC] or [used as unrestricted gift to support the mission, programs, or services of the Minnesota Jewish Community Foundation, LLC].

##### *3. Restricted Purpose Bequest*

I give, devise, bequeath, \_\_\_\_\_ (insert dollar amount, item of property, or % of residue) [of my gross estate, but no more than \$ \_\_\_\_\_] to the Minnesota Jewish Community Foundation, LLC (Tax ID number: 41 – 0693866), a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101, or its successor organization, located at 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305; (952) 593-2600. This gift is to be added to the \_\_\_\_\_ [insert the name of the fund] at the Minnesota Jewish Community Foundation, LLC to be used exclusively for [insert restricted use language here such as: a specific program, research, etc.].

#### *2. Bequest in Will where fund at MN JCF is not Established Prior to Death:*

I bequeath dollars (\$) [and/or the following described property, ] [and/or percent (%) of my residuary estate, but no more than \$ \_\_\_\_\_] to the Minnesota Jewish Community Foundation, LLC (Tax ID number: 41 – 0693866), a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101, or its successor organization, to be held in a donor-advised fund known as the [insert fund name]. I hereby name [insert name] to take all steps necessary to establish such a donor-advised fund at the Minnesota Jewish Community Foundation, LLC. [If to be used for a restricted purpose add this language: This gift is to be used exclusively [insert restricted use language here such as: for a specific program, research, etc.]. I direct [insert name(s)] to have the same grant recommendation privileges that I



would have had as a fund holder at the Minnesota Jewish Community Foundation, LLC during my lifetime (with the same authority to designate a successor).

**Retirement Account (IRA/401k/Life Insurance Policy) Beneficiary Designation**

*1. Beneficiary designation where fund at MN JCF is Established Prior to Death:*

I designate that upon my death, \$\_\_\_\_\_ (or \_\_\_\_\_ %) of my [IRA/401K/403b/etc.] account be distributed to the Minnesota Jewish Community Foundation, LLC, LLC to be added to my Minnesota Jewish Community Foundation, LLC fund (the [insert fund name] (fund #\_\_\_\_\_)).

Additional information for the designation form:

**Tax ID Number:** The Minnesota Jewish Community Foundation, LLC is a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101. Its Tax ID number is: 41 – 0693866.

**Mailing Address:** Minnesota Jewish Community Foundation, LLC, 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305.

**Phone:** (952) 593-2600

*2. Beneficiary designation where fund at MN JCF is not Established Prior to Death:*

I designate that upon my death, \$\_\_\_\_\_ (or \_\_\_\_\_ %) of my [IRA/401K/403b/etc.] account be distributed to the Minnesota Jewish Community Foundation, LLC to be added to my Minnesota Jewish Community Foundation, LLC fund (the [insert fund name] (fund #\_\_\_\_\_)). I hereby name [insert name] to take all steps necessary to establish such a donor-advised fund at the Minnesota Jewish Community Foundation, LLC. I direct [insert name(s)] to have the same grant recommendation privileges that I would have had as a fund holder at the Minnesota Jewish Community Foundation, LLC during my lifetime (with the same authority to designate a successor).

Additional information for the designation form:

**Tax ID Number:** The Minnesota Jewish Community Foundation, LLC is a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101. Its Tax ID number is: 41 – 0693866.

**Mailing Address:** Minnesota Jewish Community Foundation, LLC, 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305.

**Phone:** (952) 593-2600



## Charitable Trust

*Distribution from a Trust where a fund at the MN JCF is Established Prior to Death:*

The Trustees shall distribute dollars (\$) [and/or the following described property,] [and/or percent (%) of my trust assets, but no more than \$ \_\_\_\_\_] to the Minnesota Jewish Community Foundation, LLC, to be allocated to the [insert fund name & fund #\_\_\_\_].

Additional information for designation form:

**Tax ID Number:** The Minnesota Jewish Community Foundation, LLC is a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101. Its Tax ID number is: 41 – 0693866.

**Mailing Address:** Minnesota Jewish Community Foundation, LLC, 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305.

**Phone:** (952) 593-2600

*Distribution from a Trust where Giving Account at the MN JCF is Not Established Prior to Death:*

I bequeath dollars (\$) [and/or the following described property,] [and/or percent (%) of my Trust's assets, but no more than \$ \_\_\_\_\_] to the Minnesota Jewish Community Foundation, LLC, to be held in a [list type of fund – for example, donor-advised fund, endowment fund, etc.] known as the [insert fund name]. I hereby direct my Trustee to take all steps necessary to establish such a donor-advised fund at the Minnesota Jewish Community Foundation, LLC. I direct my Trustee to name [insert name(s)] to have the same grant recommendation privileges that I would have had as a fund holder at the Minnesota Jewish Community Foundation, LLC during my lifetime (with the same authority to designate a successor).

**Tax ID Number:** The Minnesota Jewish Community Foundation, LLC is a nonprofit limited liability company formed under Minnesota Statutes, Section 322C.1101. Its Tax ID number is: 41 – 0693866.

**Mailing Address:** Minnesota Jewish Community Foundation, LLC, 111 Cheshire Lane, Suite 50, Minnetonka, MN 55305.

**Phone:** (952) 593-2600