



### SAMPLE LANGUAGE TO INCLUDE IN YOUR ESTATE PLAN

When you update your will, you will need to share this information with your attorney:

**Legal name:** Yakima Valley Community Foundation  
**Federal tax ID number:** 20-0697012  
**Address:** 316 Yakima Avenue, Suite 201, Yakima, WA 98901

The following language may further help you and your attorney when drawing up a will that meets your needs. If you are updating your will, but not completely rewriting it, see our sample language for amendments (also called codicils):

You can modify your will without rewriting it entirely through an amendment called a "codicil." Codicils must be signed by witnesses and should be kept with the original will. Before making any changes to your estate plan, we recommend you contact your attorney or financial advisor to ensure this change will not negatively impact other pieces of your estate plan.

To modify your will by codicil to benefit the Yakima Valley Community Foundation, please consider sharing the following language with your attorney:

*I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, (the sum of \$ \_\_\_\_\_) (or \_\_\_\_\_% of my estate), (or other property herein described) to be used for its general support and charitable purposes without restriction.*

*In all other respects I ratify and confirm all of the provisions of my said last Will and Testament dated on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.*

*IN WITNESS WHEREOF, I sign, publish and declare this instrument to be a Codicil to my last Will and Testament in the presence of the persons witnessing said Codicil at my request this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.*

\_\_\_\_\_ (name)                      residing at \_\_\_\_\_

Witnesses

\_\_\_\_\_ (name)                      residing at \_\_\_\_\_

\_\_\_\_\_ (name)                      residing at \_\_\_\_\_

Once you and your attorney have finalized your codicil, we would appreciate receiving a copy so we can properly carry out your wishes. Copies can be sent to Heidi Pelletier, [heidip@yakimavalleycf.org](mailto:heidip@yakimavalleycf.org).

#### **Bequest to a Donor Advised Fund:**

Many donors wish to establish a new Donor Advised Fund through their estate plans or contribute to an existing fund.

Questions? Contact Heidi Pelletier, Director of Donor Advising  
[heidip@yakimavalleycf.org](mailto:heidip@yakimavalleycf.org) or 509-457-7616 ext 4

*"I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, the sum of \$\_\_\_\_\_ (or \_\_\_\_\_% of my estate) (or other property herein described). This gift shall be used to establish the \_\_\_\_\_ Fund (alternate language for already established DAF – benefit the XX Fund). I would like (insert names) to serve as Fund Advisors. I understand the Yakima Valley Community Foundation's Board of Directors holds legal responsibility for the fund and is solely responsible for the investment of distributions from the Fund."*

**Bequest to a Restricted Fund:**

Some donors would like their gift to support a specific project, program or area of community support. Restricted bequests are welcome, although it is important they provide for some flexibility to adapt to changing community needs and programs.

*"I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, the sum of \$\_\_\_\_\_ (or \_\_\_\_\_% of my estate) (or other property herein described) to be used for (designated purpose\*). If at any time it becomes impossible or impractical for my gift to be used for the above-designated purpose, the Yakima Valley Community Foundation shall use my gift for a purpose and in a manner that it determines most closely meets the above-designated purpose."*

If you are interested in supporting a specific project, program, or area of community support, it is best to discuss your plans in advance with our Director of Donor Advising, Heidi Pelletier. She can be reached at 509-547-7616 or [heidip@yakimavalleycf.org](mailto:heidip@yakimavalleycf.org).

**Gifts of unrestricted support:**

Unrestricted bequests are the most valuable to YVCF, as they allow us to apply your gift to the area of greatest community need. Examples of types of unrestricted bequests include:

Specific bequest:

*"I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, (the sum of \$ \_\_\_\_\_) (or \_\_\_\_\_% of my estate), (or other property herein described) to be used for its general support and charitable purposes without restriction."*

Residuary bequest:

*"I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, (all or \_\_\_\_\_ % of) the residue of the property owned by me at death, real and personal and wherever situated, to be used for its general support and charitable purposes without restriction."*

"Greater of" residuary bequest:



*"I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, the greater of \_\_\_\_\_ % of my estate or \$ \_\_\_\_\_ to be used for its general support and charitable purposes without restriction."*

Contingent bequest:

It is possible that the primary beneficiary or beneficiaries of your estate may predecease you. In that case, a contingent bequest naming the Yakima Valley Community Foundation as an alternate beneficiary can provide a meaningful alternative.

*"I give [all or \_\_\_\_\_%] of the residue of the property owned by me at my death, real and personal and wherever situated, to \_\_\_\_\_, if he/she survives me. If he/she does not survive me, I give to the Yakima Valley Community Foundation, a Washington nonprofit corporation located in Yakima, Washington (EIN #20-0697012), or its successor organization, [all or \_\_\_\_\_%] of the residue of the property owned by me at death, real and personal and wherever situated, to be used for its general support and charitable purposes without restriction."*