



Suggested Language for Legacy Plans

LANGUAGE FOR WILL:

1. I give and bequeath _____ [*describe gift*] (Note: For trusts see below.)
to the Long Beach Community Foundation (the “Foundation”), 400 Oceangate, Suite 800, Long Beach, CA 90802, FEIN 20-5054010, to hold, manage, invest and reinvest the same, to collect the net income and to pay and disburse the net income for general charitable uses and purposes, in accordance with the provisions specified in the Articles of Incorporation creating the Foundation, heretofore adopted by the Board of Directors of the Foundation, all of which provisions are hereby incorporated by reference and conclusively assented to and adopted.
2. The Fund hereby created shall be known as the _____
 (“Fund”).
Income and/or principal of the Fund shall be disbursed in accordance with instructions separately provided to the Long Beach Community Foundation. If separate instructions have not been provided, the entire amount shall be added to the Long Beach Community Foundation Endowment Fund.
3. The Foundation shall charge the Fund to the extent sufficient for reasonable and proper compensation for services and expenses.

LANGUAGE FOR LIVING TRUSTS:

Substitute the following for the first line of will language above.

1. Upon the death of _____ (the Trustor), [the sum of _____] [*or, describe gift* _____] shall be distributed...

Continue with same language as above.