



Memorandum of Philanthropic Intent (MOPI)

The Long Beach Community Foundation (LBCF) provides documentation tools and oversight for donors to outline their charitable estate directives. Documentation via the Memorandum of Philanthropic Intent (MOPI) facilitates their planned giving and accommodates changing philanthropic interests over the years. It allows donors to plan and create a philanthropy legacy long before transferring assets to a fund that will support what they've outlined and kept on file with LBCF.

When donors name the Long Beach Community Foundation as a beneficiary in their Trust or other funding source, we suggest the document read:

“This gift will be made to the Long Beach Community Foundation, a 501(c)3 nonprofit organization (tax ID #20-5054010), to be directed to the _____ (“Fund”) as described in the Memorandum of Philanthropic Intent (“MOPI”) on file with the organization.”

The MOPI, signed by the donor, is kept on file with LBCF and can be changed by the donor at any time during their lifetime. Periodically, a copy of the MOPI will be sent to the donor as a reminder of their chosen beneficiaries. If the donor's interests have changed, the MOPI can be updated. The original trust or other designating documents do not need to be changed.