



Suggested Language for Legacy Plans

LANGUAGE FOR WILL

1. I give and bequeath _____ [describe gift] to the Long Beach Community Foundation (the “Foundation”), 1 World Trade Center, 8th Floor, Long Beach, CA 90831, 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 Foundation. If separate instructions have not been provided, the entire amount shall be added to the LBCF Community Impact 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

1. Upon the death of _____ (the Trustor), [the sum of _____] [or, describe gift _____] shall be distributed to the Long Beach Community Foundation (the “Foundation”), 1 World Trade Center, 8th Floor, Long Beach, CA 90831, 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 Foundation. If separate instructions have not been provided, the entire amount shall be added to the LBCF Community Impact Fund.
3. The Foundation shall charge the Fund to the extent sufficient for reasonable and proper compensation for services and expenses.