



NORTH CAROLINA
BAR FOUNDATION

Sample Bequest Language

The following bequest language can be shared with your estate-planning attorney for review and inclusion of the North Carolina Bar Foundation in a will or living trust. The North Carolina Bar Foundation encourages you to seek the assistance of personal, legal, and financial advisors in matters relating to giving. The NCBF Development team welcomes the opportunity to partner with you, your estate-planning attorney, and financial advisors to craft a mutually advantageous giving plan. The North Carolina Bar Foundation's Employer Identification Number (EIN) or Tax Identification Number is 56-0767805.

For unrestricted gifts:

"I give, devise and bequeath _____ percent (_____ %) of my residuary estate [or, the specific bequest of _____ dollars (\$_____), or other personal or real property appropriately described) to the North Carolina Bar Foundation, Employer Identification Number (EIN) 56-0767805, a qualified 501(c)(3) charitable organization located in Cary, North Carolina, to be used for the unrestricted needs of the North Carolina Bar Foundation."

For restricted Endowment gifts or designated Annual Fund gifts:

"I give, devise and bequeath _____ percent (_____ %) of my residuary estate [or, the specific bequest of _____ dollars (\$_____), or other personal or real property appropriately described) to the North Carolina Bar Foundation, Employer Identification Number (EIN) 56-0767805, a qualified 501(c)(3) charitable organization located in Cary, North Carolina, to establish [or support] 'The _____ Fund.' The Board of Directors of the North Carolina Bar Foundation (the "Board") shall treat this Fund as part of its endowment, and the income paid out of the Fund shall be used to _____ (list purpose here). If, at some future time, the purpose for which this Fund was created no longer exists, or is no longer necessary, legal, or possible, then at the discretion of the Board, distributions may be used for a similar purpose that is as nearly aligned to my original intent as the Board deems appropriate under the circumstances. If, at the time my bequest proceeds are received they are below the Board's minimum to establish an endowed fund, then my bequest proceeds should be used at the discretion of the Board to benefit the North Carolina Bar Foundation."

For gifts accompanied by a memorandum of understanding:

"I give, devise and bequeath _____ percent (_____ %) of my residuary estate [or, the specific bequest of _____ dollars (\$_____), or other personal or real property appropriately described) to the North Carolina Bar Foundation, Employer Identification Number (EIN) 56-0767805, a qualified 501(c)(3) charitable organization located in Cary, North Carolina, to be used in accordance with the terms of the most recent written directive I have signed with the North Carolina Bar Foundation, and, if none exists, to be used as directed by the Board of Directors of the North Carolina Bar Foundation.

For restricted gifts or for the creation of named endowment funds, please contact the NCBF Development Office at Foundation@ncbar.org