



SAMPLE WORDING

LEAVING A LEGACY IN YOUR COMMUNITY

With our help, you can create a thoughtful and deliberate plan for your giving that will last beyond your lifetime and continue to make a difference. An up-to-date Will ensures your family is taken care of financially and that you have a lasting impact on the causes that matter the most to you.



How does it work?

A gift to a charity in your Will is called a **charitable bequest**. You can give a specific amount, a percentage of your estate, or a residual of your estate after your loved ones are taken care of.

You can make a gift from your Will by:

Establishing your own fund
at The County Foundation

Giving to an existing fund
at The County Foundation

Whatever option you choose, you can rest assured that your donation is invested wisely, and the proceeds are distributed according to your direction.

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Establishing your own fund at The County Foundation

The detailed instructions for your fund can be outlined in a **Memorandum of Understanding (MOU)** with The County Foundation or included directly in your Will. The County Foundation must be included in your Will and establishing your own fund requires a minimum of \$25,000.

The MOU is not legally binding but establishes the directions and goals you have for the fund. We have a number of different types of funds and you can easily update your MOU at any time.

We can walk you through this process from the beginning and ensure your giving has the greatest impact possible in the community.

Establishing your own fund at The County Foundation (continued)

Sample wording to establish a new fund from your Memorandum of Understanding

To give [\$ __/ __% / the residue] of my estate to The Prince Edward County Foundation (Charitable Registration Number 84349 6290 RR0001) to establish a permanent Fund known as the _____ as per the Memorandum of Understanding signed on _____.



Give where your money can have the greatest impact

PRINCE EDWARD COUNTY'S

VitalSigns.

Visit pecdata.ca
to learn more

The needs in Prince Edward County will continue to evolve and change. Through our **Vital Signs** reports and data, we track where the greatest need is within the County. If you want your legacy to have the flexibility to adapt to new issues as they emerge, and benefit from the Foundation's granting expertise and best practices, this is a good option for you.



Sample wording to give where the need is greatest

To give [\$ __/ __% / the residue] of my estate to The Prince Edward County Foundation, (Charitable Registration Number 84349 6290 RR0001) to establish a permanent Fund known as the _____, the income of which shall be used for general charitable purposes aligned with the objectives of The County Foundation.

Give to the causes that you care about the most

Using our research, community insights, and expertise in granting, our staff will identify which organizations are making the greatest impact on your cause(s) of choice.



**Sample wording
to give to any one
or more
charitable causes
chosen by you:**

To give [\$ __/ __% / the residue] of my estate to The Prince Edward County Foundation (Charitable Registration Number 84349 6290 RR0001) to establish a permanent Fund known as the _____, the income of which shall be used for general charitable purposes, having regard to my interest in _____ [insert one or more of the charitable causes important to you]

Establishing your own fund at The County Foundation (continued)

Give to the charities closest to your heart



By leaving a legacy, you can keep helping the charities you love, even after your lifetime. To make sure everything is set up right, please reach out to us beforehand. We'll confirm the charity's name and status for you.

We will also discuss options on where you would like the funds to be directed if any of the selected charities cease to exist at any point.

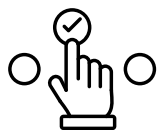
Sample wording to give to your favorite charities:

To give [\$__ / __% / the residue] of my estate to The Prince Edward County Foundation (Charitable Registration Number 84349 6290 RR0001) to establish a permanent Fund known as the _____, the income of which shall be distributed to _____ [list designated charities or charities, & their charitable registration number] in [equal or other stated] amounts.

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Give to an existing fund at The County Foundation

The County Foundation administrates a diverse range of existing funds open to accepting donations. These funds were created by caring individuals, families, and non-profit organizations in Prince Edward County.



There is no minimum amount required to donate to an existing fund. You can find a list of all our funds and learn more at www.thecountyfoundation.ca/giving/contribute-to-existing-fund/

Sample wording to give to an existing fund at The County Foundation:

To give [\$__ / __% / the residue] of my estate to The Prince Edward County Foundation (Charitable Registration Number 84349 6290 RR0001) to be added to the _____ Fund [insert exact fund name].

GET CONNECTED

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Our Executive Director, Dominique Jones, is happy to help you navigate your gifting options to find the best solution for you and our community.