

The following is sample language to use in estate planning documents, such as a will, to establish a fund, or add assets to an existing fund within the MCF:

Forever Fund Bequest, MCF's Unrestricted Endowment

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the Montrose Community Foundation, a Colorado nonprofit public charity, tax identification number 84-1128761, to benefit the Forever Fund (the Montrose Community Foundation's grantmaking program).

Bequest to Create an Unrestricted Named Fund

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the Montrose Community Foundation, a Colorado nonprofit public charity, tax identification number 84-1128761, to establish the Fund, to be held as a component fund and managed together with the Montrose Community Foundation's other endowed funds. Grants from the Fund shall be made in accordance with the Montrose Community Foundation's policies for such funds and shall be used for unrestricted charitable purposes.

Donor Advised Fund Bequest

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the Montrose Community Foundation, a Colorado nonprofit public charity, tax identification number 84-1128761, to be added to the Fund, a component fund of the Montrose Community Foundation and I direct that this bequest become part of this Fund.

Agency Fund Bequest

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the Montrose Community Foundation, a Colorado nonprofit public charity, tax identification number 84-1128761, to the _____ Fund, a component fund of the Montrose Community Foundation and I direct that this bequest become part of this Fund.

Designated & Field of Interest Fund Bequest

I give, devise and bequeath _____ (describe dollar amount, property to be given, or proportion of your residuary estate) to the Montrose Community Foundation, a Colorado nonprofit public charity, tax identification number 84-1128761, to establish the Fund, a component fund of the Montrose Community Foundation, of which distributions shall adhere to the Montrose Community Foundation's current spending policy and will be used to make grants to the following nonprofit charitable organization(s) (indicate percentage to each organization if more than one) or for the following purpose: