

Sample Bequest Language



3963 Maple Ave #390 | Dallas, TX 75219 | 214.741.9898 | dallasfoundation.org

Beneficiary Designation for an IRA or Insurance Policy

Beneficiary: The Dallas Foundation a Texas Nonprofit Corporation (Tax ID #75-2890371) for the _____ Fund.

Gift to the Community Impact Fund

I bequeath to The Dallas Foundation [*\$(amount) or (percent) % of my estate or all the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition*] for support of its general charitable purposes. The Fund shall be governed by the Articles of Incorporation (the “Articles”) dated March 24, 2015 and Bylaws (the “Bylaws”) dated June 15, 2015, as they may be amended from time to time.

Gift to Create a Field of Interest Fund

I bequeath to The Dallas Foundation [*\$(amount) or (percent)% of my estate or all the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition*] to create the [*insert name of fund as determined by donor*] (the “Fund”). The Dallas Foundation shall use the Fund [*insert field of charitable activity or population to be assisted, such as “for the support of education,” or “for the support of physically disabled children and adults”*]. The Fund shall be governed by Articles of Incorporation (the “Articles”) dated March 24, 2015 and Bylaws (the “Bylaws”) dated June 15, 2015, as they may be amended from time to time.

Gift to Create a Designated Fund

I bequeath to The Dallas Foundation [*\$(amount) or (percent) % of my estate or all the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition*] to create the [*insert name of fund as determined by donor*] (the “Fund”). The Fund shall be used for the perpetual support of the following charitable organizations: [*list names of charitable beneficiaries*]. The Fund shall be governed by the Articles of Incorporation (the “Articles”) dated March 24, 2015 and Bylaws (the “Bylaws”) dated June 15, 2015, as they may be amended from time to time.

Gift to a Donor Advised Fund

I bequeath to The Dallas Foundation [*\$(amount) or (percent) % of my estate or all the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition*] to be directed to the [*insert name of fund as determined by donor*] (the “Fund”). The Fund shall be governed by the Articles of Incorporation (the “Articles”) dated March 24, 2015 and Bylaws (the “Bylaws”) dated June 15, 2015, as they may be amended from time to time.

Gift to Create a Scholarship Fund

I bequeath to The Dallas Foundation [*\$(amount) or (percent) % of my estate or all the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition*] to create the [*insert name of fund as determined by donor*] (the “Fund”). The Fund shall be governed by the Articles of Incorporation (the “Articles”) dated March 24, 2015 and Bylaws (the “Bylaws”) dated June 15, 2015, as they may be amended from time to time.