

Below are examples of suggested bequest wording which you may share with your legal counsel. Because each individual situation is unique, we encourage you or your legal counsel to contact the Montana Community Foundation's Philanthropy Office for guidance on appropriate language to effectuate your charitable intentions, especially if you intend for your gift to be restricted for a specific use.

To MCF, unrestricted:

"I give to Montana Community Foundation, Inc. (Tax ID#81-0450150),

- the sum of _____ dollars; or
- an amount equal to _____ percent of the net value of my estate; or
- all the rest, residue, and remainder of my estate."

If you would like to designate your bequest to a particular fund, program, local community foundation, or field of interest, you can use this additional language to designate it:

It is my request that this gift be used for the benefit of [fund or program] at the Montana Community Foundation as directed in my most recent fund agreement with Montana Community Foundation.

You may designate your bequest to support any of Montana Community Foundation's existing endowments to establish a new or named endowment fund. In order to do so, please contact us before finalizing your will to discuss the necessary wording and minimum giving levels to ensure that MCF can fulfill your wishes.

The information on this website is not intended as legal, financial, or tax advice. Please consult an attorney, financial advisor, or tax advisor in your planning.

Legal Name: Montana Community Foundation, Inc.

Legal Address: 33 S. Last Chance Gulch Suite 2A, Helena, MT 59601

Tax Identification No: 81-0450150

Please contact the Philanthropy Office for assistance, especially if you plan to make a restricted bequest. We can help ensure that your legacy meets your objectives.