



Basic information

Legal Name: Shasta Regional Community Foundation
DBA: Community Foundation of the North State
Address: 1335 Arboretum Dr. Ste B, Redding, CA 96003
Phone: 530.244.1219
Tax ID: # 68-0242276
cfnorthstate.org

The Community Foundation encourages donors to discuss their estate plans with their professional advisor(s).

NATURE OF BEQUEST

If named in a Trust:

“Upon the death of the Settlor, the Trustee shall distribute **(specific amount, percentage of estate, residue of estate)** to the Community Foundation of the North State, 1335 Arboretum Dr. Ste B, Redding, CA 96003 to establish the **(NAME)** Fund to be perpetually recognized and administered by the Foundation in accordance with its guiding documents and its procedures for endowed funds.”

If named in a Will:

a. Specific dollar amount:

“I direct the sum of \$_____ to the Community Foundation of the North State, 1335 Arboretum Dr. Ste B, Redding, CA 96003 to establish the **(NAME)** Fund to be perpetually recognized and administered by the Foundation in accordance with its guiding documents and its procedures for endowed funds.”

b. Share of, or entire residue, of estate:

“I direct **(all or %)** of the remainder of my property to the Community Foundation of the North State ...

c. Specific property (personal property):

“I direct **(description of property)** to the Community Foundation of the North State...”

d. Specific property (real estate):

“I direct all of my right, title and interest in and to the real estate located at **(description of property)** to the Community Foundation of the North State...”

PURPOSE OF BEQUEST

Include a statement about the purpose, use or distribution of the gift. If the donor prefers, the Foundation can work with the donor to prepare a detailed Letter of Instruction or Fund Agreement which could then be referenced as follows in the will or trust: "...administered by the Foundation in accordance with its guiding documents and its procedures per the Fund Agreement or Letter of Instruction on file with the Foundation." Letters of Instruction may be updated by the donor at anytime.

Existing Fund:

"This bequest is to be added to the **(NAME)** Fund, a component fund of the Community Foundation of the North State, and I direct that this bequest become part of this Fund."

Fund for the North State:*

"This Fund is unrestricted in purpose as part of the Fund for the North State."

Field of Interest Fund: *(to fund agencies within a broad or specific area of interest, i.e. youth, arts, environment)* "This Fund is to be a Field of Interest Fund and will support organizations and programs which **(describe one or more areas of charitable interest)**."

Designated Fund: *(Created to benefit a specific agency/ies)* "This Fund is to be a Designated Fund, and grants from the Fund will exclusively support the following organizations: **(list nonprofit organizations and/or programs and relative percentages if desired)**."

Donor Advised Fund: "This Fund is to be a Donor Advised Fund and **(name, address)** will be the Donor Advisor(s) during their lifetime to make grant recommendations to the Foundation's Board."

Scholarship Fund: "This Fund is to be a Scholarship Fund which will provide scholarship support to **(describe scholarship purpose and selection criteria)**."

***The Fund for the North State** is a permanent, endowed fund of the Foundation which is invested to grow and grant in perpetuity to respond to the changing needs of our communities. Unrestricted bequests become part of the Fund for the North State.

For further information or questions please contact Andrea Scott, Director of Gift Planning at 530.244.1219 ext 107 or andrea@cfnorthstate.org.