



Community
FOUNDATION
OF THE NORTH STATE

PLANNING YOUR LEGACY

When you name the Community Foundation of the North State (CFNS) as your charitable beneficiary, you create a lasting legacy. You also create an easy way to distribute multiple gifts to all your favorite causes, whether as a one-time contribution or for perpetuity. To ensure your estate gift does the good work you intend, we help you develop a customized Memorandum of Charitable Intent (MOCI). This simple, flexible process is a complimentary service of CFNS designed to give you peace of mind that your wishes will be fulfilled.

CONTACT US

 530.244.1219

 Andrea Scott
Director of Gift Planning
andrea@cfnorthstate.org

 www.cfnorthstate.org



Easy

Your estate planning document names the Community Foundation of the North State as the beneficiary. The MOCI instructs us how you wish to distribute the gift.

Flexible

We understand that charitable interests may change over time. Your MOCI instructions can be easily updated anytime. You do not have to go back to your attorney to change the original will or trust document.

Expert Guidance

We know and love the North State and offer over 20 years of trusted knowledge in community-based philanthropy. We will work with you and your professional advisors to create the charitable plan that best suits your needs.

Stewardship

We check in with you periodically to ensure your MOCI continues to reflect your charitable interests.

CREATE YOUR LEGACY

One Gift + Customized Instructions = Peace of Mind

1. *Decide*

There are many options to make a gift through your estate. Your gift can be a dollar amount, a specific asset, a % of your estate or its remainder. You can also name us as a full or partial beneficiary of your retirement account. Contact us if you'd like to discuss different options or ideas.

2. *Name*

The Community Foundation of the North State is named in your estate plans; please contact us to receive sample bequest language. Designations should reference our name and EIN at the bottom of this page.

3. *Instruct*

Work with us to develop instructions for your gift with a customized Memorandum of Charitable Intent which details how your gift will be distributed. We will ensure your intentions are carefully fulfilled.

"What we realized is that anyone can do this. You don't have to be rich to give back."

Debbie & Don Bankson



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