

**SAMPLE LANGUAGE TO ESTABLISH/ADD TO  
A FUND (BY WILL OR TRUST) AT  
KERN COMMUNITY FOUNDATION**

To join Kern Community Foundation's Legacy Society, simply notify Kern Community Foundation in writing that you have made a provision in your estate plan to benefit Kern Community Foundation. The following sample language can be used by your advisor to record your intent in your estate documents.

**I. NEW CHARITABLE BEQUESTS**

**A. Use the following language to create a fund:**

I give [describe gift] to Kern Community Foundation ("Foundation"), a California nonprofit public benefit corporation having its principal office in the City of Bakersfield and State of California to be held as a component fund of the Foundation and used for the charitable purposes of the Foundation. The fund shall be known as the \_\_\_\_\_ Fund (the "Fund"). (Insert statement of purpose – see the following item B for suggestions)

**B. Statement for the purpose of the fund. Choose one from the following list:**

**OPTION I (Designated Fund):** The purpose of the Fund is to provide funds for [enter name of nonprofit organization, or if more than one, their names and shares].

**OPTION II (Field of Interest Fund):** The purpose of the Fund is to provide funds for recipients, to be selected by the Board of Directors of the Foundation, that are [state field of interest and/or area of service to be benefited; e.g. healthcare, human services, the cultural arts, education or the environment].

**OPTION III (Unrestricted Charitable Fund):** The purpose of the Fund is to provide funds for such worthy charitable purposes as the Board of Directors shall from time to time determine.

**II. ADD TO AN EXISTING FUND:**

I give [describe gift] to Kern Community Foundation ("Foundation") a California nonprofit public benefit corporation having its principal office in the City of Bakersfield and State of California to be added to the \_\_\_\_\_ Fund (the "Fund"), a component fund of the Foundation, and used for the charitable purposes of the Foundation.

**III. SAMPLE DESCRIPTION OF GIFTS**

**A. Specific Dollar Amount** (i.e. - \$25,000)

**B. Specific Asset** (i.e. - 100 shares of IBM stock)

**C. Percentage of Estate** (i.e. - 5% of the residue of my estate)