

How to Designate Gifts to the Sweet Grass Community Foundation

The following are examples of language for gifts by will, trust or beneficiary designation.

Unrestricted Gifts for an Existing Fund

Unrestricted gifts may be expended at the discretion of the Sweet Grass Community Foundation board of directors to meet the charitable purposes of the community. Unrestricted gifts may be designated as follows:

“I give _____ to the Sweet Grass Community Foundation, a Montana nonprofit corporation. This gift will be used for the benefit of the Sweet Grass Community Foundation Fund within the (Endowed / Quasi account).”

Designated Gifts for an Existing Fund

Donors may designate their gift for a specific charitable interest area within Sweet Grass County as follows:

“I give _____ to the Sweet Grass Community Foundation, a Montana nonprofit corporation. This gift shall be used for the benefit of the (Name of charitable interest) within the (Endowed / Quasi account).”

Gifts to Support Sweet Grass Community Foundation

Donors may designate gifts to support Sweet Grass Community Foundation’s work by making an unrestricted gift or contributing to the permanent endowment fund.

An unrestricted gift may be designated as follows:

“I give _____ to the Sweet Grass Community Foundation, a Montana nonprofit corporation, to be used at the direction of the Sweet Grass Community Foundation board of directors.”

Gifts to the permanent endowment fund may be designated as follows:

“I give _____ to the Sweet Grass Community Foundation, a Montana nonprofit corporation, for its permanent endowment fund.”

Gifts to Establish a New Fund

Donors wishing to establish a new fund with a planned gift are encouraged to contact their advisors and/or Sweet Grass Community Foundation. They can provide illustrations of various gift plans and sample documents as needed.

NOTE: The above information is of a general nature and is not intended as legal advice. It should not replace the counsel of your tax, legal or estate planning advisors.

For more information:

Contact Corry Seitz, Executive Director, at 406-932-3090 or cseitz@sweetgrasscf.org or visit our website at www.sweetgrasscf.org