

MODEL FORMS OF BEQUESTS FROM *LIVING TRUSTS*

A. Outright bequest

Upon the death of _____ [the Trustor(s)], [cash the sum of \$ _____] or [describe gift:][_____] shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation), located at 6505 Wilshire Boulevard, Suite 1200, Los Angeles, CA 90048. The Foundation's EIN is 95-6111928.

B. Gift to The Foundation's Unrestricted Endowment Fund

I give (cash of \$ _____) or (specified property) to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered as part of The Foundation's Unrestricted Endowment Fund with distributions to be made as part of The Foundation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines.

Upon the death of _____ (the Trustor(s)) (cash the sum of \$ _____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered as part of The Foundation's Unrestricted Endowment Fund with distributions to be made as part of The Foundation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines.

C. Gift to a Field of Interest Fund*

Upon the death of _____ (the Trustor(s)) (cash the sum of \$ _____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered by The Foundation as the _____ Endowment Fund. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines. Distributions shall be for the following charitable purpose(s):

Example: Aid for Jewish Children

Example: Aid for Jewish Elderly

Subject to the right of the Board of Trustees of The Foundation to alter the foregoing designations in the event that either or both of them shall, by reason of changed conditions, become impossible of fulfillment, impracticable or undesirable as determined by The Foundation Board of Trustees.

D. Gift to The Foundation's Restricted Endowment Fund

Upon the death of _____ (the Trustor(s)) (cash the sum of \$ _____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered by The Foundation as a restricted fund for the benefit of _____ (specified organization i.e. the United Jewish Fund of the Jewish Federation Council of Greater Los Angeles). The Board of Trustees of The Foundation may alter the foregoing field of interest designation in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Foundation Board of Trustees.

**This form is for illustration purposes. The Foundation would be pleased to discuss how Field of Interest or Restricted Funds may be tailored to meet the unique needs of a particular donor.*