



Sample Language for Bequests to the Cleveland Foundation

Specific Monetary Amount

I give, devise and bequeath the sum of \$_____ to The Cleveland Foundation, an Ohio public benefit corporation, 6601 Euclid Avenue, Cleveland, Ohio 44103, or its successor in interest, to be administered as part of, and for the purposes of, the _____ Fund of The Cleveland Foundation, in accordance with and subject to the governing instruments of the Cleveland Foundation.

or

I give, devise and bequeath the sum of \$_____ to The Cleveland Foundation, an Ohio public benefit corporation, 6601 Euclid Avenue, Cleveland, Ohio 44103, or its successor in interest, for the creation of the _____ Fund of The Cleveland Foundation to be used for annual distributions for/to [see Purposes below to insert here]. Distributions and expenditures from the Fund may be made in accordance with the spending and other policies of the Cleveland Foundation in effect from time to time, and on such other terms and conditions as in the judgment of its Board of Directors shall be appropriate from time to time.

Percentage of the Estate

I give, devise and bequeath _____ % of my estate to The Cleveland Foundation, an Ohio public benefit corporation, 6601 Euclid Avenue, Cleveland, Ohio 44103, or its successor in interest, to be administered as part of, and for the purposes of, the _____ Fund of The Cleveland Foundation, in accordance with and subject to the governing instruments of the Cleveland Foundation.

or

I give, devise and bequeath _____ % of my estate to The Cleveland Foundation, an Ohio public benefit corporation, 6601 Euclid Avenue, Cleveland, Ohio 44103, or its successor in interest, for the creation of the _____ Fund of The Cleveland Foundation to be used for annual distributions for/to [see Purposes below to insert here]. Distributions and expenditures may be made in accordance with the spending and other policies of the Cleveland Foundation in effect from time to time, and on such other terms and conditions as in the judgment of its Board of Directors shall be appropriate from time to time.

Remainder of the Estate

I give, devise and bequeath the rest, residue and remainder of my estate to The Cleveland Foundation, an Ohio public benefit corporation, 6601 Euclid Avenue, Cleveland, Ohio 44103, or its successor in interest, to be administered as part of, and for the purposes of, the _____ Fund of The Cleveland Foundation, in accordance with and subject to the governing instruments of the Cleveland Foundation.

or

I give, devise and bequeath the rest, residue and remainder of my estate to The Cleveland Foundation, an Ohio public benefit corporation, 6601 Euclid Avenue, Cleveland, Ohio 44103, or its successor in interest, for the creation of the _____ Fund of The Cleveland Foundation to be used for annual distributions for/to [see Purposes below to insert here]. Distributions and expenditures may be made in accordance with the spending and other policies of the Cleveland Foundation in effect from time to time, and on such other terms and conditions as in the judgment of its Board of Directors shall be appropriate from time to time.

Purposes:

Cleveland Foundation's unrestricted use
for the Cleveland Foundation's unrestricted use

Fields of Interest (currently existing)
for public-education improvement
for neighborhood revitalization
for youth development
for arts advancement
for economic transformation
for healthcare needs

Designated Organizations
to one or more I.R.C. Section 501(c)(3) public charity organization(s) and in the percentages as follows:
name(s) of organizations, address(es), percentage(s) totaling 100%

Cleveland Foundation Tax ID Number:

34-0714588

Note: The Cleveland Foundation Philanthropy Team is happy to assist and answer any questions as you prepare your clients' estate planning documents.