



## Wills and Bequests

The Community Foundation of Lethbridge and Southwestern Alberta is honoured to be considered as the recipient of a bequest. Including the Community Foundation in your Will enables you to provide meaningful, lasting support for causes that are important to you, after your passing.

By disclosing that you have made the Community Foundation a beneficiary of a future gift, you make it possible for your generosity to be recognized now. It also allows you to make clear to the Community Foundation any restrictions or specific wishes for your gift. (Please see the attached Bequest Form for more information.) All future gifts will be kept confidential unless it is the donor or donors' wish to be acknowledged publicly.

Bequests should name the "Community Foundation of Lethbridge and Southwestern Alberta" as the beneficiary. The following Will clauses are provided as examples only:

"I give, devise, and bequeath to the Community Foundation of Lethbridge and Southwestern Alberta (dollar amount of gift of property or portion of the residue) to be used in such manner as the Board of Directors may direct."

"I give, devise, and bequeath to the Community Foundation of Lethbridge and Southwestern Alberta (dollar amount of gift of property or portion of the residue) to be used for the purpose of \_\_\_\_\_."

After the above clause, the following wording is requested:

"Recognizing that, at some time in the future, it may be found that the income from the fund cannot be usefully applied for the expressed purpose, then the income and capital may be used for any other related purpose approved by the Board of Directors of the Community Foundation of Lethbridge and Southwestern Alberta, within the general aims and objectives of the Community Foundation of Lethbridge and Southwestern Alberta, and in keeping with the original wishes of the donor.

The receipt of the gift by the proper agent of the Community Foundation of Lethbridge and Southwestern Alberta shall be sufficient discharge, and, therefore, my Trustee shall be under no obligation to see that the trusts thereof are carried out."

If you are considering a planned gift to the Community Foundation, we strongly encourage you to seek professional financial and legal advice that takes into account your personal circumstances. We also encourage you to discuss your wishes with your loved ones. To ensure the Bequest may be fulfilled as intended, we suggest that you or your advisor consult with Community Foundation Executive Director Charleen Davidson, prior to finalizing the details of your gift arrangement, by contacting the Community Foundation office at 403-328-5297.



# COMMUNITY FOUNDATION

LETHBRIDGE + SOUTHWESTERN ALBERTA

## Bequest Notification Form

Please mail your form to: Community Foundation of Lethbridge and Southwestern Alberta  
Unit 50, 1202 2nd Avenue South  
Lethbridge, AB T1J 0E3

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, Province, Postal Code: \_\_\_\_\_

\_\_\_\_\_ I/We have made a provision for the Community Foundation in my/our Will as follows: (Please describe the nature of the Bequest below.)

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ I/We have listed the Community Foundation as the beneficiary of a life insurance policy.

\_\_\_\_\_ I/We have left a Bequest to the Community Foundation and wish to remain anonymous.

If you wish to share with us the size or amount of your gift, you may do so here:

\_\_\_\_\_

If your gift to the Community Foundation is intended to support a specific fund or cause, please describe any wishes or restrictions in an attached document. (If you wish to have a fund agreement for your future gift put in place, please contact Executive Director Charleen Davidson at [c davidson@cflsa.ca](mailto:c davidson@cflsa.ca) or 403-328-5297.)