Including a charitable bequest in your will is a simple way to make a lasting gift to your community. When you make this gift through the Community Foundation of North Central Massachusetts, we establish a special fund that benefits the community forever and becomes your personal legacy of giving.

How it works

- You include the community foundation in your will as a bequest; we can help you or your attorney with recommended language.
- You determine the type of fund you would like to establish with your gift.
- Upon your death, we set up a special fund in your name, in the name of your family, or in honor of any person or organization you choose.
- Your charitable gift is excluded from your assets for estate tax purposes.
- Our professional staff considers your charitable wishes and determines the areas of community need that would be most impacted by grants from your gift.
- Our board issues grants in the name of the fund you establish (if you prefer, grants can be made anonymously).
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs.

Can I choose the charitable organization or cause?

Yes, you can support the arts, education, environment, human services or any charitable cause you are passionate about.

When should I include a gift in my estate plan?

Any time you change or update your will or estate plan. Your financial or legal advisor can provide professional guidance on your specific estate, beneficiaries, income goals, taxes and other considerations.

How do I plan an estate gift?

Call your attorney or give us a call. We provide confidential philanthropic services without pressure or obligation.

Visit cfncm.org to learn more about The Legacy Society
When you join The Legacy Society of North Central Massachusetts, you’ll find opportunities to share and connect with other caring individuals in the community. You’ll be invited to:

**Name your charitable fund.** We encourage you to use your gift to honor the name of your family or loved one. You may also choose to remain anonymous.

**Attend special community events.** You’ll be invited to various Community Foundation events to meet other generous people who have provided for North Central Massachusetts in their estate plans.

**Learn of changes to Massachusetts probate or federal tax law.** We will make sure we keep you up-to-date on changes to state and federal tax laws.

**Be named in Community Foundation of North Central Massachusetts publications.** We’d like to give others the opportunity to follow your example of community stewardship and leadership. Of course, you can remain anonymous.

**Share your personal story.** We would like to preserve your story and photographs for future generations who will receive grants from your fund.

Including a charitable bequest in your will is a simple way to make a lasting gift to your community. Thank you for preserving a portion of your estate for your community.

Since our inception, the Community Foundation, which has assets of more than $40 million, has made nearly $40 million in grants and distributions for health and human services, education, environment, animal welfare and the arts and culture.

### The Simple Way to Leave a Bequest

The Community Foundation of North Central Massachusetts will help you with the language to include in your will.

☐ **Yes**, I would like to leave a bequest to the following nonprofit organization __________________________

City/Town ____________________ State _____________

Your Name __________________________

Address __________________________

City________________________State____Zip_________

Email_____________________Phone________________

Please contact Linda Mack, Vice President of Development and Donor Services, at 978-345-8383, ext. 321 or lmack@cfncm.org, who will provide you with proposed draft language you can share with your...