



## Planned Giving and Gifts of Stock

### *Example Bequest Language*

To make a gift by will or trust to Community Conservation, please use the following suggested wording:

1. "I give \_\_\_\_\_ [describe the gift] to Community Conservation Inc. ("CC") federal tax id # 39-1655800, a nonprofit corporation organized and existing under the laws of Wisconsin and with a principal mailing address of 120 Sunset Ridge Avenue, Suite 114, Gays Mills, WI 54631, for its charitable purposes as defined in and subject to the provisions of CC's Articles of Incorporation as they exist on this date or as they may hereafter be amended. All assets of the irrevocable gift shall be assets of CC or its affiliated supporting organization and not a separate trust. The gift shall be received, held and administered subject to the provisions of the CC's Social Responsibility Policies, including those provisions which may permit the Board to amend, modify or vary any of the purposes, directions, restrictions or conditions set forth herein."

If no additional restrictions are to be placed on the gift, only this language is required. For additional assistance please contact your attorney or financial advisor.

### *Restrictions and Use of Bequest Funds*

A gift may be a specific dollar amount, a percentage of an asset or the estate, its remainder or a specified asset. Unrestricted gifts will be added to Community Conservation Inc.'s general fund, and used in support of our ongoing projects at the Board of Directors' discretion. Unrestricted gifts are best able to support Community Conservation's mission because of the frequently changing nature of their projects. However, suggestions as to use of the gift from designated advisor for the gift will be considered by the Community Conservation Board of Directors, and it is understood that no successor advisors shall be named by the initial gift advisor.

### *Gifts of Stock*

Community Conservation is also happy to accept gifts of stock. Stocks that are received that fit the Board of Director's Social Responsibility Profile will be kept, and stocks that do not will be sold and the proceeds used to support Community Conservation's mission. Please contact Executive Director April Sansom at (608) 735-4717 or [april@communityconservation.org](mailto:april@communityconservation.org) for assistance in making a gift of stock.