



GIVING TO THE FOUNDATION THROUGH YOUR WILL OR TRUST

The San Francisco Foundation has received many of its most significant gifts in the form of bequests and is deeply grateful to donors who provide for the future of the San Francisco Bay Area. Thank you for considering this meaningful way to include the Foundation in your estate plans. Below you will find some sample bequest language for you to review with your attorney.

Legal Name: The San Francisco Foundation

Address: One Embarcadero Center, Suite 1400, San Francisco, CA 94111

Tax ID #: 01-0679337

SAMPLE BEQUEST LANGUAGE

Support the mission and work of the San Francisco Foundation

Since we first opened our doors in 1948, we've been committed to social justice in the Bay Area. One of the many ways that we invest in an equitable Bay Area is by providing grants from our own endowment to nonprofit organizations that are tackling disparities head on throughout our region. To support our mission of advancing racial equity and economic inclusion through our endowment, please use the following bequest language:

I give [description of property] to The San Francisco Foundation, a community foundation primarily serving the San Francisco Bay Area, California, to carry out its work and effect its purposes.

Make a Gift Supporting Your Philanthropic Vision

If you are interested in making a gift designated for one (or multiple) purposes or to be distributed according to a specific timeline, please contact us to complete a gift agreement. This agreement details the terms of your gift and specifies how your gift will be used. By using a gift agreement with the Foundation, you can easily update the agreement if your charitable plans change without needing to also update your estate plan. Please use the following bequest language in conjunction with the gift agreement:

I give [description of property] to The San Francisco Foundation, a community foundation primarily serving the San Francisco Bay Area, California, to be used according to the terms set forth in the [name of fund] Fund agreement I have on file with The San Francisco Foundation. In the event that there is no such executed agreement, this gift shall be directed to the general endowment of The San Francisco Foundation in order to carry out its work and effect its purposes.

Include a Gift to an Existing Donor Advised Fund

Some donors want to provide charitable funds for their families to carry on their philanthropic legacy. By making a bequest to support your donor advised fund, your gift and any remaining assets in your donor advised fund are made available to your successor advisor(s) for grantmaking. Additionally, our Philanthropic Services team can assist you now in creating a customized grantmaking plan for you and your successor advisor(s). Please use the following bequest language to make a gift from your estate plan to your donor advised fund at the San Francisco Foundation:

I give [description of property] to The San Francisco Foundation, a community foundation primarily serving the San Francisco Bay Area, California, for the [name of your donor advised fund], a donor advised fund of The San Francisco Foundation.

Customize Your Future Gift

We are happy to discuss additional options with you and/or team of advisors for designating a bequest to the San Francisco Foundation that can fulfill your financial and philanthropic goals. Please contact us to learn more.

LET US THANK YOU

If you have included The San Francisco Foundation in your estate plans, we would like to thank you for your generosity and invite you to the Bay Area Promise Society. The Bay Area Promise Society is our recognition society comprised of those like yourself who are making a lasting impact on future generations in the Bay Area.

Enrollment is completely optional and there is no fee nor any obligations as a member. It simply means that you will receive specific communication and invitations, and we have a donor wall in our office where we display member names (some prefer to remain anonymous).

QUESTIONS?

Contact: Stephanie Dustman
Planned Giving Officer
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