



Whatcom Community Foundation

CONNECTING PEOPLE WHO CARE
WITH CAUSES THAT MATTER

If you are considering charitable donations in your estate,

Take this Test...

Simply check each box that is “True” for your estate plan!

- My donation will continue to serve the community as I wish even if a specific charity changes its emphasis, or governance, or disbands.
- My funds will be part of a large enough pool to allow diversified, safe investment, able to be held in various stocks, bonds, and accounts depending upon market conditions, returns, and risk factors.
- My money will be watched over by a team of reliable, audited professionals.
- The fees my estate pays for management of the funds will be reasonable and will not be subject to “extra” charges.
- The person or organization chosen to execute my wishes is expert, local, and reputable, *as are his or her successors.*
- The establishment of my gift funds and the definition of their purposes can be/has been accomplished easily, quickly, and without significant legal fees or red tape.
- My support can easily go to local, regional, or even international charitable activities as I have specified with no extra effort on the part of my executors.
- If I wish, my family and/or my heirs can easily direct the distribution of my gifts, yet the principal will be preserved so my gifts can continue in perpetuity if that is my goal.
- There is no question that my gifts will be fully tax deductible to the maximum extent, and I will be counseled whenever needed regarding tax issues for the funds.
- I am sure that all my charities will be “vetted” regularly and in perpetuity to be sure that they continue to be worthy and meet my goals as I have wished.

If you didn't check a box or two...or more...why not read the four “papers” we've prepared about windfalls, ethical wills, copying Buffet and caring for others. You'll see we help donors like you make the charitable portions of their estates work effectively, efficiently, and as the donors intended, and we are organized so that the funds are secure and productive and stay that way! We serve folks who have a little or a lot to give, all at once, over time, or in perpetuity, and perhaps we can help you with your estate planning.

