

## **SAMPLE “LETTER OF INSTRUCTION TO THE COMMUNITY FOUNDATION FOR DISTRIBUTION OF PROCEEDS”**

To simplify the process of creating and updating your will to reflect your evolving wishes for your final gifts it may be convenient to make a simple bulk bequest to a Community Foundation Fund and leave the detail specification of your desires to a “Letter of Instruction” to the Foundation. That way you can save some of the legal expenses involved with placing those potentially changing wishes directly in your will.

The following is a sample of what that letter might contain. We request that you arrange a meeting with the Foundation Executive Team to review your letter in detail so as there is a common understanding and accurate implementation of your final wishes.

Board of Directors San Juan Island Community Foundation PO Box 1352  
Friday Harbor, WA 98250

To Whom It May Concern,

I hereby request that the Board of Directors of the San Juan Island Community Foundation use the following guidelines in the distribution of awards from funds gifted to the Foundation as a bequest in my final will and testament.

### **LIST OF DIRECTIVES**

My goals in supplying these directives are the following: (Note this is desirable so that your underlying wishes are carried out in perpetuity in the face of changing conditions and non profit organizations)

LIST OF GOALS There are certain special conditions that I wish to place on the distribution of the funds: LIST OF CONDITIONS AND/OR EXCLUSIONS

I hereby appoint the following person(s) as my succeeding advisor with whom the Foundation can consult to best determine my final wishes. I understand that such advisor has no legal authority to direct the Foundation to any action but only will serve as a source of information for the Foundation Board’s consideration.

Sincerely,

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