

MEMORANDUM

TO: The Columbus Foundation

FROM: Jane and John Doe

RE: Gift Intention

This is to advise you that we have named The Columbus Foundation (the "Foundation") as a beneficiary under our estate plans. Upon the Foundation's receipt of any gift under our estate plans, the Foundation shall use the gift to create or augment, as the case may be, a component charitable fund at the Foundation to be known as the *Jane and John Doe Legacy Fund* (the "Fund").

The Foundation shall make distributions from the Fund in accordance with a spending policy adopted by the Board of Trustees of the Foundation annually for component funds of the Foundation. The annual amount determined in accordance with the spending policy shall be distributed as follows:

1. _____ percent (_____%) to [ORGANIZATION NAME].
2. _____ percent (_____%) to [ORGANIZATION NAME] for [PURPOSE].
3. _____ percent (_____%) to animal welfare organizations in central Ohio, with such organizations selected in the discretion of the Foundation.
4. _____ percent (_____%) to support the central Ohio community's greatest needs and most promising opportunities through the Foundation's unrestricted grantmaking.

If the above organization(s) ceases to exist or no longer carries out a charitable purpose, the Governing Committee may select a successor organization(s) providing similar charitable purposes.

Our names may be listed as Legacy Society members in the Annual Report as:

- ☐ Jane X. and John X. Doe
- ☐ Please DO NOT list our name in the Annual Report

BY: _____ DATE: _____
Jane X. Doe

BY: _____ DATE: _____
John X. Doe

MEMORANDUM

TO: The Columbus Foundation

FROM: Jane Doe

RE: Gift Intention

This is to advise you that I have named The Columbus Foundation (the "Foundation") as a beneficiary under my estate plans. Upon the Foundation's receipt of any gift under my estate plans, the Foundation shall use the gift to create or augment, as the case may be, a component charitable fund at the Foundation to be known as the *Jane Doe Fund* (the "Fund").

The Foundation shall [distribute the assets of the Fund in their entirety over ten (10) years in as equal annual shares as possible OR make outright distributions from the fund as soon as practical and possible] to the following organizations in the following proportions:

1. _____ percent (_____%) to [ORGANIZATION NAME].
2. _____ percent (_____%) to [ORGANIZATION NAME].
3. _____ percent (_____%) to [ORGANIZATION NAME] for [PURPOSE].

If the above organization(s) ceases to exist or no longer carries out a charitable purpose, the Governing Committee may select a successor organization(s) providing similar charitable purposes.

My name may be listed as a Legacy Society member in the Annual Report as:

- ☐ Jane X. Doe
- ☐ Please DO NOT list my name in the Annual Report

I request that the Foundation work with my Financial Advisor, [John Smith, CFP®], on the investment management of the Fund.

BY: _____ DATE: _____
Jane X. Doe