

This is some suggested wording to use if you would like to give a legacy to Sussex Community Foundation. Please contact us if you have a query or would like to talk through any particular requirements.

Leaving a legacy to set up a Donor Advised Fund

If your legacy has a value greater than £25,000, you may wish to establish a Donor Advised Fund with us. This will allow you to directly specify the causes you want to support.

For legacies below £25,000, we would encourage donations to our unrestricted funds or one of our four funding priorities: Tackling Poverty, Improving Health, Reaching Potential or Acting on Climate. These pooled funds support hundreds of charities and community groups across a range of causes in Sussex.

In such cases, we would suggest the following wording:

"I give to Sussex Community Foundation, registered charity number 1113226 absolutely, the [sum or name of property] to be applied by the Foundation for its general charitable purposes and I direct that it be paid into a designated fund to be called [_____] and used for the purposes outlined in my last written communication to the Foundation subject to the articles of association and constitution of Sussex Community Foundation including the power of the Board of Trustees to modify any restriction or condition on the distribution of funds for any specified charitable purpose or to specified organisations, if in its sole judgement such restriction or condition becomes in effect unnecessary, incapable of fulfilment or inconsistent with the charitable needs of the area served by the Sussex Community Foundation.

A receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors."

Residuary legacy

"I give to Sussex Community Foundation, registered charity number 1113226 absolutely, all [or the size of the Foundation's share, eg half] the residue of my estate absolutely and I direct that:

- (i) the assets comprising such residue may be used for the general purposes of Sussex Community Foundation, and
- (ii) a receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors."

Pecuniary or specific legacy

"I give to Sussex Community Foundation, registered charity number 1113226 absolutely, the sum of £_____ [or name of item/property for specific legacy] and direct that it *(be paid into a designated fund to be called _____ and):

- (i) may be used for the general purposes of Sussex Community Foundation, and
- (ii) a receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors."