

# Plan for Future Giving at Community Foundation Santa Cruz County

A Memorandum of Charitable Intent (MOCI) is a simple document that the Community Foundation uses to help you create and direct gifts from your estate, whether through your will, living trust or beneficiary designation. The MOCI is unique to our Community Foundation.

1

## Easy

Your estate planning document simply names the Community Foundation as the beneficiary of your charitable gifts. Your MOCI instructs us how to distribute the gift. Your successor trustee or executor only needs to write one check.

2

## Flexible

We know that charitable interests often change over time. Your MOCI can be easily updated at no cost to you. You do not have to go back to your attorney to change the original will or living trust document.

3

## Expert Guidance

We know and love Santa Cruz County and offer over 40 years of trusted knowledge of local nonprofits. We have worked with most of the local estate planning attorneys and can work with your attorney if you would like.

4

## Supportive

We check in with you periodically to ensure your MOCI continues to reflect your charitable interests.



“The Foundation’s knowledge of our community assures me that the causes I care about will be taken care of.”

- Ginny Solari Mazry, MOCI Holder



 **COMMUNITY FOUNDATION**  
SANTA CRUZ COUNTY

## Memorandum of Charitable Intent (MOCI)

# 3 Easy steps to get started

**1** **Decide what you want to leave to charity** (can be a dollar amount, a specific asset, or % of your estate or its remainder)

**2**

**Include the following language in your will or living trust:**

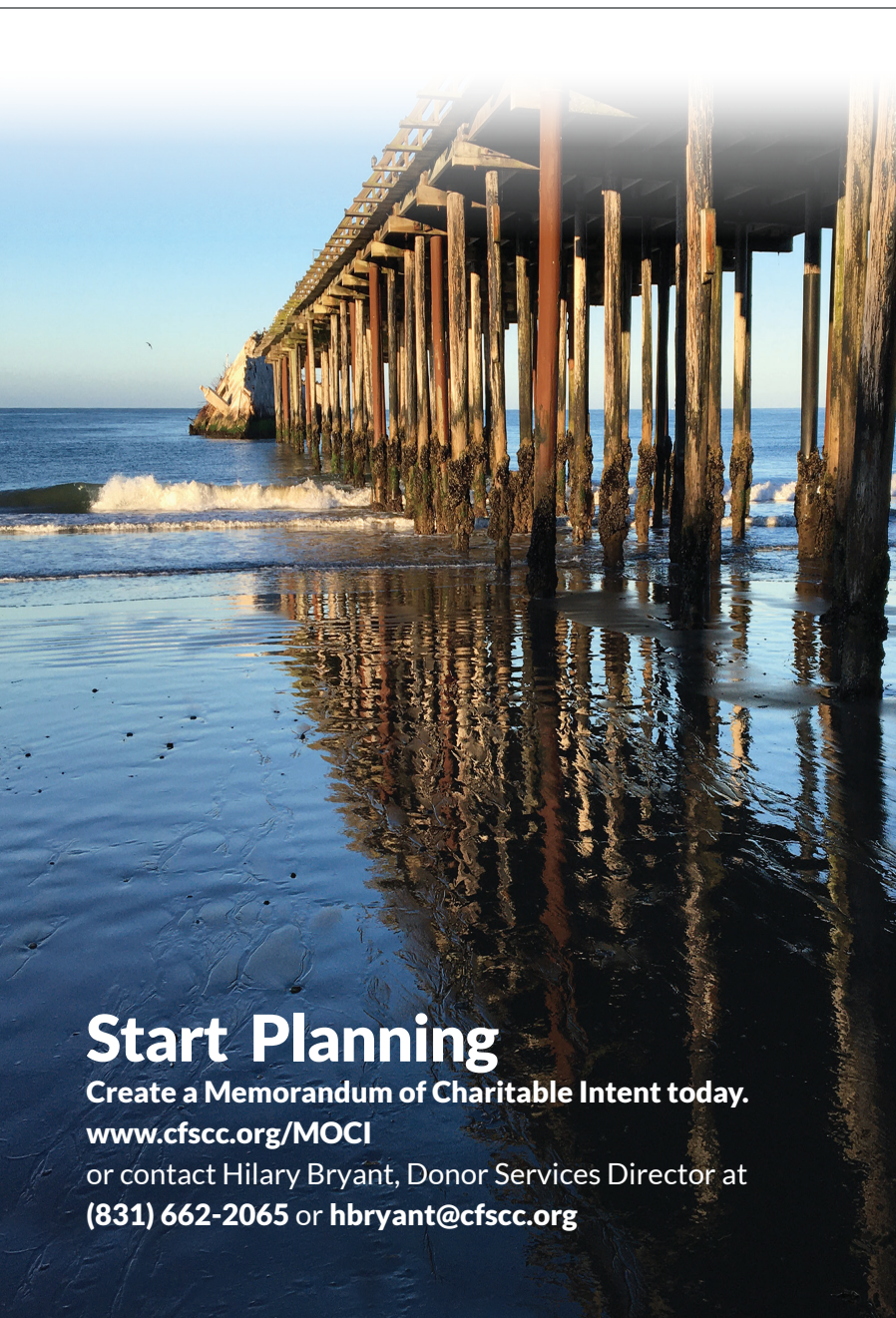
*"This gift will be made to Community Foundation Santa Cruz County, EIN 94-2808039, a 501(c)3 nonprofit organization, to be directed as described in the most recent Memorandum of Charitable Intent on file with the organization."*

Or, if you wish to name the Foundation as the beneficiary of a retirement plan or life insurance policy, the beneficiary name would be:

*"Community Foundation Santa Cruz County, EIN 94-2808039, per MOCI"*

**3**

**Work with the Community Foundation** to identify where your gift goes as well as how and when it will be distributed



**“ Our MOCI has given us an opportunity to direct some of our hard-earned money to things that are meaningful and important to us.”**

- Rita Bryant, MOCI Holder



**“ The Community Foundation is a wonderful resource for professional advisors. I have confidence in the Foundation and their ability to help my clients with charitable legacy gifts. We work together to incorporate those gifts into the estate plans that I prepare.”**

- Emily Buchbinder, Estate Planning Attorney



## Start Planning

Create a Memorandum of Charitable Intent today.

[www.cfsc.org/MOCI](http://www.cfsc.org/MOCI)

or contact Hilary Bryant, Donor Services Director at (831) 662-2065 or [hbryant@cfsc.org](mailto:hbryant@cfsc.org)

**S** COMMUNITY FOUNDATION  
SANTA CRUZ COUNTY

7807 Soquel Dr. | Aptos, CA 95003  
(831) 662-2000 | [cfsc.org](http://cfsc.org)

Tax ID: 94-2808039