

# Memorandum of Charitable Intent (MOCI) Worksheet



## Memorandum of Charitable Intent regarding charitable distributions from the estate of

### to Community Foundation Santa Cruz County.

The purpose of this Memorandum of Charitable Intent ("MOCI") is to serve as a guide to Community Foundation Santa Cruz County ("Foundation") in carrying out the philanthropic objectives of

*Donor(s) / Legal Name(s)*

The Donor(s) has stated that assets directed from their estate to the Foundation, net of the Foundation's Bequest Fee, be used for the following charitable purposes. *(Please note: Specifying dollar amounts is optional.)*

#### Pass Through Gifts/Direct distributions to the following nonprofits

\$ or % \_\_\_\_\_ to \_\_\_\_\_  
*Organization Name*

\_\_\_\_\_  
*Address or TaxID#*

\$ or % \_\_\_\_\_ to \_\_\_\_\_  
*Organization Name*

\_\_\_\_\_  
*Address or TaxID#*

\$ or % \_\_\_\_\_ to \_\_\_\_\_  
*Organization Name*

\_\_\_\_\_  
*Address or TaxID#*

#### Alternate Instructions

In the event that an organization listed above is not in existence at the time funds are distributed, then the Donor(s) wishes the organization's gift to be: (select one)

divided equally among the remaining organizations

given to \_\_\_\_\_ instead  
*Organization Name and Address*

added to a CFSCC fund \_\_\_\_\_  
*Name of Fund(s) \*See full fund list at www.cfsc.org/ways-to-give*

used by the Foundation for the following charitable purpose(s): \_\_\_\_\_

other: \_\_\_\_\_

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## Add to Existing Community Foundation Funds

\$ or % \_\_\_\_\_ to \_\_\_\_\_  
*Name of Fund(s)*

\$ or % \_\_\_\_\_ to \_\_\_\_\_  
*Name of Fund(s)*

\$ or % \_\_\_\_\_ to \_\_\_\_\_  
*Name of Fund(s)*

*\*See full fund list at [www.cfsc.org/ways-to-give](http://www.cfsc.org/ways-to-give)*

## New Fund(s) to be Created at the Community Foundation

\$ or % \_\_\_\_\_ to *(name of new fund)* \_\_\_\_\_

Fund purpose *(if applicable)*: \_\_\_\_\_

\$ or % \_\_\_\_\_ to *(name of new fund)* \_\_\_\_\_

Fund purpose *(if applicable)*: \_\_\_\_\_

In the event that the allocation for a new fund does not meet the Community Foundation's minimum for new funds at the time of distribution, the allocation will be added to the existing Community Foundation Fund that it most closely resembles.

### Disclosures:

**GIFT ACCEPTANCE:** All gifts are subject to Community Foundation Gift Acceptance Policies.

**BEQUEST FEE:** All bequests are subject to a one-time fee to assist in covering costs related to the receipt of the bequest, and to support the Community Foundation's programs and services. The fee, set by the Foundation board of directors, is currently 2%.

**VARIANCE POWER:** This Memorandum, like all instruments of transfer creating or adding to a fund of this Corporation, is subject to the Community Foundation's authority to vary the terms of the gift, commonly known as the Variance Power. In accordance with the Articles of Incorporation of the Corporation, in Article IX, Section 9.4 of the Bylaws and Treasury Regulation Section 1.170A-9(f)(11)(v)(B)(1), the Community Foundation Board has the power to modify any restriction or condition on the distribution of funds for any specified charitable purposes or to specify organizations if in the sole judgment of the Board (without the necessity of the approval of any participating donor, advisor appointed by a donor, trustee, custodian, or agent), such restriction or condition becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the community or area served.

## Donor Review, Confirmation & Recognition

I/We have reviewed this Memorandum of Charitable Intent and confirms that it reflects my/our wishes. I/We understand that I/we have the right to update this Memorandum at any time. I/we understand that I/we are now members of the Community Foundation's Legacy Society and may receive invitations to special events and recognition (as indicated below) in Legacy Society listings.

*Please select one*

**It's fine to include me/us on public Legacy Society listings. Please list me/us as:**

\_\_\_\_\_   
*Name as you would like it to appear*

**I/we prefer to remain anonymous.**

## Signatures

\_\_\_\_\_  
*Donor name (please print)*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Donor name (please print)*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*



**For good. For ever. For All.**