

## Sample Purpose Statements for Legacy Funds

- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be to provide support to organizations that provide health and social services for seniors.
- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be to support arts and music education in the public schools and to support the training of caregivers to the elderly.
- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be to support various charitable purposes, primarily college and vocational scholarships or training projects that assist in elevating individuals' economic status and reducing their dependence.
- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be to support the following organizations:

- 20% - San Diego Rescue Mission
- 1% - Chula Vista Community Congregational Church

The remaining dollars should be distributed where the need is greatest. Particular attention should be given to organizations with reasonable administrative expenses that serve women, children, and seniors in need. In the event that any one of these organizations should (i) no longer be described in Sections 170(c)(1) or (2) of the Internal Revenue Code (ii) become subject to bankruptcy proceedings under state or federal law or (iii) liquidate and dissolve or otherwise cease to exist then the assets of the Fund shall be applied as described in paragraph 6 below.

- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be:
  - 50% - educational and economic opportunities for girls
  - 25% - efforts that increase renewable energy, energy conservation and pollution reduction
  - 25% - KPBS at home and like media around the world
- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be to support St. Columbans Foreign Mission Society (50%), Old Mission San Luis Rey (35%), Brother Beno Foundation (2%), Women's Resource Center (3%) and the donors' Catholic parish at time of death (10%). In the event that any of these organizations should (i) no longer be described in Sections 170(c)(1) or (2) of the Internal Revenue Code (ii) become subject to bankruptcy proceedings under state or federal law or (iii) liquidate and dissolve or otherwise cease to exist then the assets of the Fund shall be applied as described in paragraph 6 below.
- ☞ Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be
  - 20% to support the Point Loma United Methodist Church, San Diego, CA,
  - 40% to support the Webb Institute, Glen Cove, NY,
  - 20% to support the San Diego Archaeological Center, Escondido, CA, and
  - 20% to support environmental and performing arts organizations in San Diego County as determined by the Board of Governors of The San Diego Foundation.

Subject to the limitations of paragraph 4 below, the Fund shall have two primary purposes. The first purpose will be to provide college scholarships to individuals who have already demonstrated, through academic performance, extra-curricular involvement and/or community service, their ability and commitment to overcome significant socio-economic, cultural, racial, language or other barriers. The scholarship is available for any young adult in the greater San Diego Metropolitan area to attend any accredited U.S. public or private university or junior college. Scholarships will be available only to attend institutions which are inclusive of all ethnicities, religions, and backgrounds."

The second purpose for the fund will be to provide funding for education and outreach programs that promote classical music within the public school systems, grades 5 through 12, in the San Diego Metropolitan area. This fund may also provide musical instruments and music lessons for kids who couldn't otherwise afford them.

For all programs and scholarships, priority will be given to students attending schools ranking low on a socio-economic scale and high on a scale of cultural diversity.

Subject to the limitations of paragraph 4 below, the purpose of the Fund shall be to provide scholarships to graduating seniors of Monroe City High School, Monroe City, Missouri. In the event that Monroe City High School should (i) no longer be described in Sections 170(c)(1) or (2) of the Internal Revenue Code (ii) become subject to bankruptcy proceedings under state or federal law or (iii) liquidate and dissolve or otherwise cease to exist, then the assets of the Fund shall be applied as described in paragraph 6 below.

Subject to the limitations of paragraph 4 below, the primary purpose of the Fund shall be to support the following charitable organizations or other qualified organizations that sustain similar charitable activities. The list is in order of priority for weighting disbursement of funds.

World Heritage Fund, UNESCO-Account #9491-191558

To support restoration and preservation of international historical sites.

The Bishop's School-La Jolla, CA

To provide scholarship funds specifically for a student or students enrolled in the vocal music curriculum.

The San Diego Opera Ensemble and/or Education and Outreach programs

To provide funds to support the training of professional singers and introduce classical music to schoolchildren.

The Forever Friends Society-Helen Woodward Animal Center, Rancho Santa Fe, CA

To support animal rescue and other humane activities.

The Heifer Project International, Little Rock, Arkansas

To support reduction of world hunger.

In the event that the above listed organizations should (i) no longer be described in Sections 170(c)(1) or (2) of the Internal Revenue Code (ii) become subject to bankruptcy proceedings under state or federal law or (iii) liquidate and dissolve or otherwise cease to exist, then the assets of the Fund shall be applied to other charitable organizations with similar objectives to the reasons stated and as described in paragraph 6 below.