

Legacy Society Intent Form

Please complete this form to document your non-binding estate gift to the Community Foundation for Northeast Georgia. Knowing your intentions helps us plan for our community's future.

Name(s): _____

Preferred address: _____

City: _____ State: _____ Zip: _____

Email: _____ Preferred phone number: _____

Date of birth: _____ Spouse's date of birth: _____

Please include me/us in The Legacy Society (select one):

ANONYMOUSLY or LISTED AS: _____

(e.g. Mr. & Mrs. Smith; Jane & John Smith, etc.)

I do not wish to be listed in future Community Foundation for Northeast Georgia publications as a member of the legacy society.

I have included the Community Foundation in my financial and/or estate planning using the following method(s):

- Outright bequest payable upon my/our death(s) directly to the Community Foundation
- Charitable remainder trust with the Community Foundation named as a charitable beneficiary
- Life Insurance payable to the Community Foundation for Northeast Georgia at death
- Beneficiary designee on an IRA, pension plan, 401(k), 403(b) or revocable living trust to the Community Foundation for Northeast Georgia

Other: _____

If you wish, please advise us regarding the approximate value of your gift: \$ _____

The Foundation and I both understand that future fluctuations of the value of my assets may have an impact on this current value. (No value will ever be printed or released without permission.)

Donor's Signature _____ Date: _____

Donor's Signature _____ Date: _____

Dear (INSERT NAME):

What's your why? For Carol S. Camp, it was a desire to help others - even beyond her lifetime. Carol, and fundholders like you, are the reason we've been able to donate nearly \$90 million to very worthy charities since 1985.

Why am I sharing this? Well, it's because I have some exciting news and a personal invitation just for you. We know that many of you desire to leave a legacy of giving like Carol did. That's why we want to invite you to become a Founding Member of the Community Foundation's Legacy Society. This new and exciting opportunity provides a way for the Community Foundation to thank and forever recognize you as a generous visionary who desires to create a lasting impact.

How do you become a founding member of our Legacy Society? Simply include the Community Foundation in your estate planning!

If you have already included the Community Foundation in your estate planning, please complete and returning the Legacy Society Intent form to us.

If you have not included the Community Foundation in your estate planning but would like to, simply designate a gift to the Community Foundation in your will or trust. There are many other planned giving options, such as donating appreciated assets, making us the beneficiary of your IRA, 401K or a life insurance policy and of course cash contributions, so we encourage you to consult your financial advisors. Once plans are completed, send us the Legacy Society Intent form so we can add you as a new member!

Like Carol, you too can use your journey of generosity to create a lasting impact. I've included her story so you can read why she included the Community Foundation as part of her estate. Our journey through life is a series of stories - will you let us help write your Legacy Story?

Again, thank you for continuing to support the Community Foundation. We will be announcing all the founding members of the Legacy Society at our 2019 Good2Give Celebration on Saturday, August 17th so please return your Legacy Society Intent Form prior to that time. Should you have any questions please don't hesitate to contact us.

Warm regards,