



STATEMENT OF DONOR INTENT

The **Legacy Society** of the Eau Claire Community Foundation recognizes individuals and families who have made provision for a gift to the Foundation in their estate plan. Membership is by written confirmation of your deferred gift arrangements. Thank you for allowing the Eau Claire Community Foundation to assist you in carrying out your philanthropic goals.

I have included the Eau Claire Community Foundation in my estate plan in this way:

- ☐ My will designates a portion of my estate to the Eau Claire Community Foundation.
- ☐ I/We have created a Charitable Trust with the Eau Claire Community Foundation as the beneficiary.
- ☐ I/We have designated the Eau Claire Community Foundation as a beneficiary of a Qualified Retirement Plan.
- ☐ I/We have established a Gift Annuity with the Eau Claire Community Foundation as the beneficiary.
- ☐ I/We are interested in setting up a fund now at the Eau Claire Community Foundation.
- ☐ I/We have set up a life insurance policy with the Eau Claire Community Foundation as the beneficiary.
- ☐ I/We have made other plans: _____

☐ It is my/our intent that this gift be added to an existing fund at the Eau Claire Community Foundation and governed by all related agreements: _____. (Fund name)

☐ It is my/our intent that this gift be allocated: (\$ or %) _____ to the Community Fund
(\$ or %) _____ to the Operations Fund

☐ It is my/our intent that this gift be used to create a new fund at the Eau Claire Community Foundation: _____ (Fund name)

The amount of my/our gift is estimated to be \$ _____. (Optional)

☐ I have not made a decision yet, but I am interested, call or email me regarding the Legacy Society.

☐ I/We accept your invitation to become a Legacy Society Member and give permission to use my/our name in Foundation publications.

☐ I/We wish the gift to remain anonymous until the Foundation receives their legacy bequest.

☐ I/We wish the gift to remain anonymous.

Name as it will appear in publications: _____
Print or type name

Address: _____ Phone: _____

City/State/ZIP: _____ Email: _____

Signature: _____ Date: _____

This "Statement of Intent" is non-binding

Approved 10/27/2011