



Legacy Society Membership

The Community Foundation of Dunn County Legacy Society recognizes all those who have notified us that they have included the Foundation in their will or other deferred giving plan. The Board of Directors recommends that everyone consider leaving a legacy through the Community Foundation to benefit their community for today *and* tomorrow.

There are only two steps needed to join the Legacy Society:

1. Arrange your estate to leave a gift to the Community Foundation of Dunn County (CFDC).

The most common ways to do this are to:

- a. make a bequest through your will or trust
- b. make an IRA/401K beneficiary designation
- c. designate CFDC as a life insurance policy beneficiary
- d. create a Charitable Trusts (life income arrangements)
 - i. Charitable Remainder Trust
 - ii. Charitable Lead Trust
 - iii. Charitable Gift Annuity

Note: We recommend that you discuss these options with your family and with your attorney, accountant, insurance agent or financial planner as may be appropriate. You may also contact the Foundation office to discuss the various ways to leave your legacy through the Community Foundation.

2. Inform the Community Foundation (CFDC) that you have made the necessary arrangements by returning the form below. This will also give us permission to include your name in future listings of the Legacy Society members. Please contact the Foundation if you wish to remain anonymous.

The Legacy Society

I/We have made a provision for Community Foundation of Dunn County in my/our estate plans and wish to be included in the Foundation's Legacy Society. I/We agree to be included in published listings of the Society's members.

Print name(s) as you wish to be listed.

Signatures

Dated this _____ day of _____, 20_____.