

PUTNAM COUNTY COMMUNITY FOUNDATION

2 South Jackson Street • Greencastle, Indiana 46135 • Phone: 765.653.4978 • Fax: 765.653.6385

The Legacy Society Enrollment Form *(Please complete both sides of form)*

Yes! I/We wish to join the *Legacy Society* and have designated the Putnam County Community Foundation as a full or partial beneficiary of my/our estate plans as indicated below:

Retirement Assets Life Insurance Gift Annuity Will Trust

Yes! I/we agree to be included in published listings.

Signature

Printed Name

Date

Signature

Printed Name

Date

Continued on back of form



MEMBERS

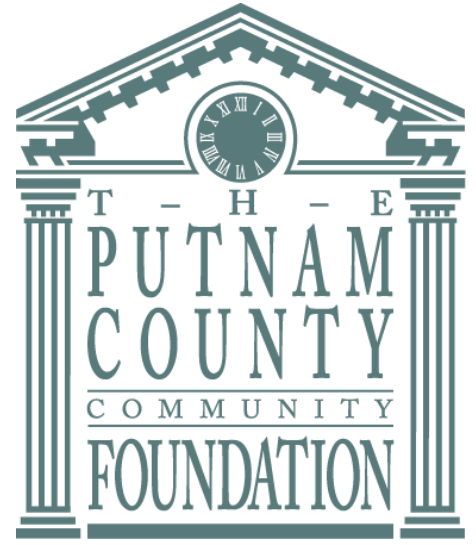
The Community Foundation's *Legacy Society* is composed of visionaries whose foresight and generosity are shaping the future of our community.

- Jason Asbury
- Gwen Bottoms
- Ralph Carl*
- Sherman and Maria Chancellor
- Therese Cunningham
- Ellen Dittmer
- Robert Evans
- Stuart Fabe
- Steve and Pat Gaulty
- Dr. Thomas and Elizabeth Graffis
- Thelma Hardman
- Maxine Haskett
- Betty J. Hedge*
- Mary Ellen Huggard
- Vera May Kierstead-Farber
- Mary Louise Miller*
- Monty and Vicki Montgomery
- Ray and Elaine Peck
- Murray and Sara Pride
- Malcolm S. Romine
- Julia Romine
- Edythe Schendel
- J. R. and Ginger Scott
- Steve & Cara Setchell
- Jeff and Denise Sigworth
- Ruby Stringer*
- Orville Webb*
- Howard L. Williams*
- Eric A. Wolfe
- Eleanor Ypma

*Deceased

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www.pcfoundation.org



The Legacy Society Enrollment Form (Please complete both sides of form)

Please initial all of the following statements that apply:

- A copy of the gift instrument is attached.
- My / Our gift is designated for (name of new or existing fund) _____
- Please contact me to discuss my/our intentions for this legacy gift. (It is recommended that all Legacy Society Members meet with us so we can understand your wishes).
- Documentation and instructions regarding this gift are to be obtained from the following institution or advisor: _____

Contact Person/Advisor

Institution Name

Institution Address

Print Legacy Society Member Name(s)

Address

City

State

Zip

Telephone

Email Address



What is YOUR LEGACY?

The *Legacy Society* recognizes donors who have invested in the future of our community by naming a new or existing fund at the community Foundation as a full or partial beneficiary in their estate plans.

QUICK FACTS

- 1. YOUR CHOICE.** With the flexibility of the Community Foundation, your estate plans can support any charitable cause or organization.
- 2. SELF-REPORTED.** *Legacy Society* members are self-reported and give permission to publish their membership. Others who have included the Putnam County Community Foundation in their estate plans, may wish their intentions to remain confidential.
- 3. JUST TWO STEPS TO JOIN.** First, arrange for a planned gift to a new or existing fund administered by the Community Foundation. Second, inform the Putnam County Community Foundation that you have made the necessary arrangements by returning the attached *Legacy Society* form.
- 4. FULL DISCLOSURE OPTIONAL.** Donors are encouraged to discuss their gifts with us to ensure we understand and can fulfill their wishes. However, disclosure is not mandatory for membership or to leave a legacy gift.
- 5. NO MINIMUM CONTRIBUTION.** There is no minimum contribution required to qualify for membership, though \$12,000 is the minimum gift to start your own endowment.

PLANNED GIVING METHODS

Many find that with planning they are able to direct monies to charities that they would otherwise have paid in taxes.

Full or partial beneficiary designations to charity are commonly accomplished through the following methods:

1. Will or trust document
2. Retirement asset beneficiary form
3. Life insurance beneficiary form
4. A charitable remainder trust
5. A charitable gift annuity

Feel free to contact us. We also recommend you discuss these options with your family and with your attorney, accountant, insurance agent or retirement plan administrator.

JOIN US AND SHAPE THE FUTURE OF OUR COMMUNITY.

"If everyone had a will and left just 5% of his or her assets to charity, Putnam County would have an additional \$2 million dollars each year for the public good." — *Wealth in Indiana, Community Assistance Initiative, 2006.*