



THE LEGACY SOCIETY

The Community Foundation of Switzerland County Inc. created The Legacy Society as a way to recognize and thank the individuals that have included the Foundation in their will or other deferred giving plan.

How to join:

Step One: Arrange to leave a gift from your estate to the Community Foundation of Switzerland County Inc. Common ways to do this are:

- A bequest through your will or trust
- A designation of all or a portion of your retirement assets
- A life insurance policy beneficiary designation
- A charitable gift annuity

We recommend that you discuss these options with your family and with your attorney, accountant, insurance agent or financial planner as may be appropriate.

Step Two: Inform the Community Foundation of Switzerland County Inc. that you have made the necessary arrangements by returning the form below.

ENROLLMENT FORM

This statement of intent is not a legal obligation and may be changed at my discretion.

I have made a gift to the Community Foundation of Switzerland County Inc. in my estate plans.

By submitting this document, I/We will become members(s) of The Legacy Society. For publication purposes, I/We provide the following directive:

_____ I/We give permission to use my/our name(s) in the Foundation's publications and society's membership roster on the website.

_____ I/We wish to remain anonymous.

Name: _____ Date of Birth (year optional): _____

Name: _____ Date of Birth (year optional): _____

Street Address: _____

City, State, Zip: _____

Telephone: _____ Email: _____

Donor Signature

Date

Donor Signature

Date