



KEY POINTS ABOUT THE LEGACY SOCIETY

1. The Legacy Society was established as a way to recognize and thank people who are planning gifts today that will provide a benefit to the Switzerland County community in the future.
2. The Legacy Society membership is self-reported. We know others that may have included the Community Foundation in their estate plans, but they choose to remain anonymous.
3. Joining The Legacy Society requires two steps. First, arrange for your estate to leave a gift to the Community Foundation. Second, inform the Community Foundation of your gift by submitting an enrollment form. Forms are available at the Foundation's office and on our website, www.cfsci.org.
4. There is no minimum amount needed to be left to the Community Foundation to qualify for membership. Only that you have made the necessary arrangements for the gift.
5. The Community Foundation does not ask how much is being left to the Foundation. However, we do encourage donors to discuss their gifts with us to make sure we can comply with their wishes. We can also assist you in making arrangements for exactly how you would like the Community Foundation to use your gift.
6. Bequests are the most common method used to leave a gift to the Community Foundation. Other deferred gifts include designating all or a portion of your retirement assets to the Foundation, making the Foundation the beneficiary of an insurance policy, establishing a charitable gift annuity through the Community Foundation and others. All can qualify for membership into The Legacy Society.
7. We list The Legacy Society members in many of our marketing materials. Members will be listed each year in our annual report, our website will continually have a list of the members, and the list will appear in other Community Foundation publications from time to time. We can list individuals as "Anonymous" that wish to inform the Community Foundation of their gift but prefer not to let the public know.

COMMUNITY FOUNDATION OF SWITZERLAND COUNTY INC.

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