

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 (ECCF) to assist you in carrying out your philanthropic goals.

I HAVE INCLUDED ECCF IN MY ESTATE PLAN BY INCLUDING IT IN MY:

- Will or Revocable Trust Charitable Trust
 Life Insurance Policy Qualified Charitable Distribution (Retirement Plans)
 Other: _____

- The gift will be allocated: (\$ or %) _____ to an existing or to establish a Fund
(\$ or %) _____ to ECCF's Community Fund, unrestricted for Eau Claire area
(\$ or %) _____ to ECCF's Operations Fund to support ECCF's community work

- The gift is to be added to an existing fund at ECCF as governed by all related agreements:
Name of Fund: _____

- The gift will be used to establish a new fund at ECCF:
New Fund Name: _____
Purpose: _____

Legacy Society Member

- I am undecided, but interested, call or email me regarding the Legacy Society
 I accept your invitation to become a Legacy Society Member and give you permission to use the name(s) listed
ECCF publications
Name as it will appear in publications: _____
 The membership will remain anonymous until ECCF receives our legacy bequest
 The membership will remain anonymous, forever

Name: _____

Address: _____ Phone: _____

City/State/ZIP: _____ Email: _____

Signature: _____ Date: _____

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Alternative/Additional Directions

Sample Language to include a planned gift as part of your will:

I/we bequeath to Eau Claire Community Foundation (tax ID# 1891064) located at 306 S Barstow Suite 104 Eau Claire, WI 54701 _____% of my residual estate – OR – the sum of \$_____ to be used for charitable purposes set forth in a Statement of Intent or a Letter of Understanding held by Eau Claire Community Foundation.

Please return completed and signed form to:

Eau Claire Community Foundation
306 S. Barstow St., Suite 104
Eau Claire, WI, 54701

Or email to info@eccfwi.org

Nonbinding Statement of Intent

Board approved _____

Revisions approved 9/25/2019