



Giving Back. Moving Forward.

Joining the Legacy Society

The Legacy Society recognizes individuals and couples who have notified the Community Foundation that they have named the Charlevoix County Community Foundation as the beneficiary of any type of planned or deferred gift.

Joining the Legacy Society can be accomplished in two easy steps:

1. Include a charitable bequest designating the Community Foundation as a beneficiary in your estate plan. Such bequests are generally accomplished by including the Foundation as a beneficiary of:
 - A will or trust
 - An IRA or 401K retirement plan
 - A life insurance policy
 - A charitable gift annuity, charitable remainder trust or other planned gift
2. Inform the Charlevoix County Community Foundation that you have made the necessary arrangements by returning the form that is printed below. Returning the completed form will allow us to acknowledge your planned gift.

Legacy Society Designation Form

- ☐ I/We have made a provision to include the Charlevoix County Community Foundation as a beneficiary of my/our estate plans, and wish to be included in the Legacy Society.

The Foundation is authorized to list the following name(s) as members of the Legacy Society:

(Please print your name(s) as you would like them to be listed)

- ☐ I/We have made a provision to include the Charlevoix County Community Foundation as a beneficiary of my/our estate plans, but prefer not to be listed as members of the Legacy Society.
- ☐ I/We have made a provision to include the Charlevoix County Community Foundation as a beneficiary of my/our estate plans, but prefer not to be listed as members of the Legacy Society. The Foundation is authorized, however, to recognize the gift under the title of "Anonymous."
- ☐ I/We have not yet made provisions to include the Charlevoix County Community Foundation as a beneficiary of my/our estate plans, but would like additional information about how I/we might utilize the Foundation as we consider leaving a legacy gift.

Signature

Date

Email Address

Printed Name

Street Address or P.O. Box

City

State

Zip Code

Phone

Please return the completed form to:

Chip Hansen, President
Charlevoix County Community Foundation
P.O. Box 718
East Jordan, MI 49727