



Thank you for your generous commitment to the Community Foundation of North Central Wisconsin (CFONCW). To better understand your intentions for this gift, we ask that you please complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Questions? Please call CFONCW at 715.845.9555

Your Contact Information

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ H C W Email\* \_\_\_\_\_

\*You will receive occasional email updates from CFONCW. We will not sell, rent or exchange your email address

About Your Gift

If you are willing to disclose information about your gift, please check all that apply. If you choose to provide an estimate of the value of your gift, please use today's dollars:

- Will
IRA or Retirement Plan Assets
Trust
Charitable Remainder Trust
Life Insurance Policy
Other:

The approximate value of my gift is \$\_\_\_\_\_ or \_\_\_\_\_% of my estate or residue. (Optional)

Your Gift Will Support

- % Highest priorities of CFONCW (Unrestricted)
% Named Community Enhancement Fund (\$250,000 minimum)
% An existing Agency or Field-of-Interest fund held at CFONCW
% Your existing named fund held at CFONCW
% A new named fund
% Other:



# Legacy Society

## Statement of Intent

### Acknowledging Your Gift & Legacy Society

CFONCW may publicly acknowledge our gift. Please list my/our names as:

Anonymous

If anonymous, you may publicly recognize my/our gift once it is realized

A portion of my/our legacy gift will create or add to a permanent (endowment) fund at CFONCW, and i/we would like to become a member of the CFONCW's Legacy Society.

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

### Alternative/Additional Directions:

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

*"I give to the Community Foundation of North Central Wisconsin, a Wisconsin nonprofit public charity, (insert the percentage of your estate, trust or a sum of money) OR (all my right, title and interest in the following described property \_\_\_\_\_). This gift shall be used to establish the \_\_\_\_\_ Fund and shall be invested and distributed at the sole discretion of the Community Foundation of North Central Wisconsin's Board of Directors." (If you wish to name additional beneficiaries, please state them here.)*