



Legacy Gift Planning

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 you to 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 at any time. Please contact us with any questions; 715-845-9555.

Your Contact Information

Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email* _____

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

Professional Advisor(s) Contact Information _____

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

_____ % CFONCW's Wausau Marathon County Impact Fund

_____ % An existing Agency or Field – of – interest Fund held at CFONCW _____

_____ % Your existing named Fund held at CFONCW _____

_____ % A new named Fund _____

_____ % Other: _____

If you choose to open a new fund, would you like it endowed? Yes _____ No _____



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Acknowledging Your Gift & Legacy Society

Please list your name(s) as you wish to be acknowledged: _____

I/We wish to be anonymous

I/We wish to join the Legacy Society

I/We wish to be invited to the Community Foundation’s educational and celebratory events.

Donor(s) Signature(s): _____ Date: _____

_____ Date: _____

Additional Directions:

The CFONCW recognizes the generosity and forethought of donors who make a gift through their estate, in any amount from any source, through our Legacy Society.

By sharing any detail about your future gift with us, we welcome you into this extremely important and appreciated group of donors.