

# LEGACY SOCIETY

## HOW DO YOU WANT TO BE REMEMBERED?

What type of impact do you want to have on the causes that matter to you? As you make plans for the future, these are important questions to consider. If you are like many others in our community, developing a planned gift may be part of your response.

Joining the Legacy Society gives you a way to make a gift during or after your lifetime. These gifts are created to help you meet your personal, financial, philanthropic, and estate planning goals.

### How it works:

- You include the Community Foundation in your will as a bequest. We can help you or your attorney with the recommended language.
- You determine the type of fund you would like to establish with your gift.
- Upon your death, we set up a fund in your name, in the name of your family, or in honor of any person or organization you choose.
- Our professional program staff considers your charitable wishes and determines the areas of community need that would be most impacted by grants from your gift.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift – and all future earnings from your gift – is a permanent source of community capital, helping to do good work forever.

**Join the Legacy Society** by filling out the Community Foundation's statement of intent form. You will be joining a list of individuals who have notified us of their plans to leave a lasting gift to our community.

### Sample Bequest Language

"I direct that all remaining assets comprising my estate (or a fixed amount, percentage, or particular asset) be distributed to the Community Foundation of North Central Wisconsin (EIN 39-1577472) with the request that such funds be utilized for purposes I may have recommended to the Foundation in writing during my lifetime, or if such recommendation doesn't exist, at the sole discretion of the Community Foundation."

This preferred language provides flexibility for future revision. Your generosity can address multiple charitable interests, yet you can revise your wishes easily without incurring the costs of changing your documentation. However, if you want to include the name of the fund(s), it can be added to the bequest language.

## D.J. & MARY CLARE FEEMAN'S LEGACY



D.J. and Mary Clare Freeman were married for over 70 years, the epitome of life partners. The Community Foundation was fortunate enough to have them as passionate philanthropic partners since the Foundation's earliest days, with Mary Clare serving on the board of directors. Donors, award recipients, and Legacy Society members, the Freeman's legacy is embedded in the very fabric of the Community Foundation.

The Freemans were the impetus of Wausau's 400 Block, bringing a vision for the city's gathering spot, and, in 2017, the couple received the Community Foundation's Spirit of Philanthropy Award.

During their various travels, they found that communities and connections are what makes people healthy. They were role models teaching us that 'You can't do it alone. We build it together.'

**Thanks to their generosity and service, the Freeman's legacy will live on in our community.**

