



Greater Menomonie Area Community Foundation

Joining the Legacy Society

Our Legacy Society recognizes all those who have notified us that they have included the Foundation in their will or other deferred giving plan. Our Board of Directors recommends that everyone consider leaving a legacy through the through the GMACF.

Here's how to join the Legacy Society – just two steps:

1. Arrange your estate to leave a gift to the GMACF. Common ways to do this are:
 - a. Bequest through your will or trust
 - b. IRA/401K designation
 - c. Life Insurance policy beneficiary designation
 - d. Charitable Trusts (life income arrangements)
 - i. Charitable Remainder Trust
 - ii. Charitable Lead Trust
 - iii. Charitable Gift Annuity

Note: We recommend that you discuss these options with your family and with your attorney, accountant, insurance agent or financial planner as may be appropriate. You may also contact the Foundation office to discuss the various ways to leave your legacy through the Community Foundation.

2. Inform the Greater Menomonie Area Community Foundation that you have made the necessary arrangements by returning the form below. This will give us permission to include your name in future listings of the Legacy Society members.

Greater Menomonie Area Community Foundation
P.O. Box 53, Menomonie Wisconsin 54751 715-232-8019

The Legacy Society

I/We have made a provision for the Greater Menomonie Area Community Foundation in my/our estate plans and wish to be included in the Legacy Society. I/We agree to be included in published listings of the Society's members.

Please print name(s) as you wish to be listed.

Signature

Date

Key Points about the Legacy Society

1. The Legacy Society is a list of those who have named the Greater Menomonie Area Community foundation as the beneficiary of any type of planned or deferred gift ... and who choose to be listed. The purpose is to develop a large list that will encourage others to do the same.
2. Legacy Society membership is self-reported. We know many others have included the GMACF in their estate plans, but choose to remain anonymous. Thus, they cannot be members of the Society.
3. Joining the Legacy Society requires two steps. First, arrange for a planned gift in favor of the Foundation. Second, inform the GMACF by submitting the Legacy Society form. Legacy Society forms are available through many Dunn County attorneys and financial planners, or from the GMACF office. You may also print the form directly from the internet at www.gmacf.org
4. There is no minimum gift amount necessary to qualify. Only that you have made the necessary arrangements and are willing to be listed. Today we have received bequests, or know of future bequests or other types of planned gifts having a wide range of value from Society Members.
5. Legacy Society members may designate the use of distributions from their future gifts, or may leave the distributions to the discretion of the GMACF Grants Committee. A Legacy Society gift may be used to establish a new Named Fund (if the size requirements are met) or may be added to any of the Foundation's existing funds.
6. We do not ask how much is being left to the Foundation. We encourage donors to discuss their gifts with us to make sure we can comply with their wishes, but this is not required.
7. Bequests are the most common method used to leave a gift to the GMACF. However, we also know people who will the Foundation the beneficiary of 401K/IRA plans, insurance policies, established a charitable trust in favor of the Foundation, or used other methods. All can qualify a person or couple for membership in the Legacy Society.
8. We will list the Legacy Society members in our publications. With our Annual Report, our Newsletters, ads in newspapers and event programs. We will make 5 or 6 public listings of Legacy Society members each year. Each listing brings new inquiries and new members.
9. We will hold a special reception just for Legacy Society members each year, and members are invited to all other Foundation Events.
10. Finally ... There are many not-for-profit organizations and programs worthy of consideration and support, but the "ultimate philanthropy" is the Community Foundation itself. Gifts supporting the Greater Menomonie Area Community Foundation will ensure our ability to create a better future for all of us.