



Legacy Circle Gift Intent Form

As evidence of my/our desire to provide a legacy of support to the Community Foundation of South Puget Sound, I/we hereby inform the Foundation that I/we have made a provision for a legacy gift to the Community Foundation of South Puget Sound in my/our estate plan. I/We understand that this commitment is revocable, and I/we can modify it at any time.

This gift will benefit:

- ☐ The Community Foundation's Programs & Operations
- ☐ The Community Fund – The Community Foundation's Grantmaking Fund
- ☐ A Specific Fund: _____

This gift will be made through the following (check all that apply):

- ☐ Will or Living Trust ☐ Retirement Plan Assets ☐ Donor Advised Fund
- ☐ Charitable Remainder Trust ☐ Life Insurance Policy ☐ Real Estate or Other Non-Cash Assets
- ☐ Other: _____

Financial/Legal Advisor Name (Optional): _____

The Current Estimated Value of this Gift is (Optional): _____

Thank You for joining the Legacy Circle! We sincerely appreciate and honor your commitment as a member of our Legacy Circle. We also welcome the opportunity to provide you with recognition, ongoing communication, and appreciation for your intended gift and encourage others to consider the Community Foundation (and our communities) in their estate plans (the value of a gift is always confidential.)

Please select your recognition preference:

- ☐ I/We give Community Foundation staff permission to publish our name(s) as Legacy Circle member(s)
- ☐ I/We give Community Foundation staff permission to publish the Fund Name but not my/our name(s)
- ☐ I/We give Community Foundation staff permission to publish the Fund Name and my/our name(s)
- ☐ Please do not publish my name or the Fund name as a Legacy Circle member (keep my gift anonymous)

Printed Name

Signature

Date

Printed Name

Signature

Date

Please contact me/us at: _____ OR _____
Phone Number *Email*