



The **Legacy Society** is a group of visionary people who have named the Community Foundation for Monterey County in their estate plans or created an endowed fund at the Community Foundation.

**Steps to become a member of the Legacy Society:**

1. Arrange for a gift through your estate or a deferred giving vehicle, or create an endowed fund through a current gift.
2. Inform the Community Foundation that you have made the necessary arrangements by returning this form.

**I/We would like to become a Member of the Legacy Society (choose one by marking "X" in box)**

I/We agree to have my/our names(s) included in the listing of Legacy Society members in publications and on the Website of the Community Foundation.

Print name(s) as you wish to be listed: \_\_\_\_\_

I/We have made a planned gift to the Community Foundation but would prefer to remain anonymous.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Optional:** Some individuals choose to inform us of the nature of their planned gift, as it helps the Community Foundation with its long-range planning and ensures that the Community Foundation is able to use your gift(s) as intended:

I have provided for a future gift to the Community Foundation in the following way: *(Check all that apply)*

	Confidential Estimated Value: <b>(Optional)</b>
<input type="checkbox"/> My /Our will/ living trust	\$ _____
<input type="checkbox"/> A charitable remainder trust or gift annuity	\$ _____
<input type="checkbox"/> An IRA or other retirement plan	\$ _____
<input type="checkbox"/> Other	\$ _____

My intention is that the Community Foundation use this future gift(s) for:

\_\_\_\_\_

\_\_\_\_\_