

PUTNAM COUNTY COMMUNITY FOUNDATION

2 South Jackson Street • Greencastle, Indiana 46135 • Phone: 765.653.4978 • Fax: 765.653.6385

Legacy Society Enrollment Form *(Please complete both sides of form)*

- Yes!** I/We have designated the Putnam County Community Foundation as a full or partial beneficiary of my/our estate plans as indicated below and wish to join the *Legacy Society*.
- Yes!** I/we agree to be included in published listings.

Retirement Assets Life Insurance Gift Annuity Will Trust

Signature _____ Printed Name _____ Date _____

Signature _____ Printed Name _____ Date _____

Continued on back of form



LEGACY SOCIETY MEMBERS

The Legacy Society recognizes donors who have invested in the future of our community by naming a new or existing fund at the Community Foundation as a full or partial beneficiary in their estate plans. The Community Foundation is pleased to recognize members of *The Legacy Society*. This list includes members added through March 22, 2012.

Grace Aker, Hannah Aker, Jason Asbury,
Gwendolyn Bottoms, Ralph Carl*,
Sherman & Maria Chancellor, Therese A.
Cunningham, Ellen T. Dittmer, Robert W. Evans,
Stuart A. Fabe, Vera May Farber*, Steve Gaulty,
Patricia Gaulty*, Thomas & Elizabeth Graffis,
Thelma Hardman, Maxine R. Haskett, Betty J. Hedge*,
Mary Ellen Huggard, Robert & Jamie Jedele,
Todd & Katrina Lewis, James C. Luzar, Mary Louise
Miller*, Monty & Vicki Montgomery, Flo Ann
Morrison, George & Elizabeth Murphey, Ray & Elaine
Peck, Murray & Sara Pride, Julia J. Romine, Malcolm
S. Romine, Edythe E. Schendel, J. R. & Ginger Scott,
Steve J. Setchell, Jeff & Denise Sigworth, Margaret
Emily Stoner*, Ruby Stringer*, Dale Teaford*,
Orville Webb*, Howard L. Williams*, Eric A.
Wolfe, Eleanor Ypma

*Deceased

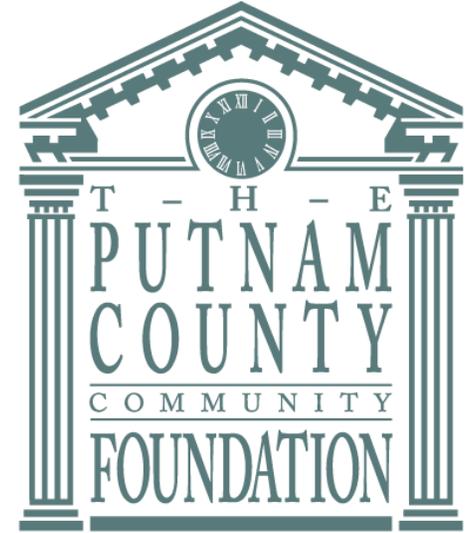
**JUST 5% WILL
SHAPE THE FUTURE
OF OUR COMMUNITY.**

“If everyone had a will and left just 5% of his or her assets to charity, Putnam County would have, on average, an additional \$2 million each year for the public good.”

Wealth in Indiana, Community Assistance Initiative, 2006.

PUTNAM COUNTY
COMMUNITY
FOUNDATION

THE
LEGACY
SOCIETY



*Make the Gift
of a Lifetime*

Make the Gift of a Lifetime

The Community Foundation's Legacy Society is designed to inspire people from all walks of life and income levels to think beyond their lifespans when doing good works. Imagine how much good could be done if each one of us remembered a favorite charity or cause in a will or estate plan! Ensure that the charitable organizations and causes you have loved during your lifetime will continue to be supported long after you are gone.

JOIN OUR LEGACY SOCIETY

JUST TWO STEPS. **First**, arrange for a planned gift to the Putnam County Community Foundation. **Second**, give us permission to list your name in publications to inspire others to do the same. See enrollment form.

NO MINIMUM CONTRIBUTION. There is no minimum contribution required to qualify for membership in *The Legacy Society*, though \$12,000 is the minimum gift to start your own endowment either now or in the future. Donors are encouraged to discuss their gifts with us to ensure we understand and can fulfill their wishes. While encouraged, disclosure of amounts and estate plan details is not mandatory for *Legacy Society* membership.

We recommend you discuss these ideas with your family and your professional advisors.

Contact Elaine Peck for free and confidential information: 765.653.4978.

WAYS TO GIVE

Charitable gift planning should be a part of every diversified retirement and estate plan. Begin by inventorying your assets and learning about the tax implications of each one. Many find that with planning they are able to direct monies to charities that they would otherwise have paid in taxes. Planned giving methods range from simple to more complex and from free to costly. Please find a few of the many ways to give below.

Life Insurance, IRA, TIAA-CREF, 401(k) plans: When updating your beneficiary forms, name the Putnam County Community Foundation as a full, partial, or contingent beneficiary. This is free, easy, and completely revocable.

Real Estate / Property / Stock / Business: Explore the benefits of donating all or a portion of your appreciated property or business **BEFORE** you sell. Avoid capital gains taxes and receive other benefits.

CD's: Convert your low yielding CDs into a charitable gift annuity and provide guaranteed, fixed income for life for yourself or your designee. You will receive a charitable deduction the year the gift is made and a portion of the annual income is non-taxable.

Will: Create an enduring legacy through your will by naming the Community Foundation as a beneficiary of a general bequest, a specific bequest, a residuary bequest or a contingent bequest.

Trusts: Protect vulnerable family members or yourself by creating a trust through your attorney. There are a variety of trusts for every need.

Checklist to join the Legacy Society:

- ___ My / Our gift is designated for (name of new or existing fund) _____
- ___ (Optional) The estimated value of the future gift at this time is \$ _____
- ___ A copy of pertinent pages of the gift instrument is attached **OR** _____
- ___ Documentation and instructions regarding this gift are to be obtained from the following institution or advisor: _____

Contact Person/Advisor _____

Institution Name _____

Institution Address _____

Print Legacy Society Member Name(s) as you wish to be listed in our materials. _____

Address _____

City _____

State _____

Zip _____

Telephone _____

Email Address _____



The Legacy Society Enrollment Form
Please complete both sides of this form.