



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)

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

 Print name(s) as you wish to be listed

 Signature(s) 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: (Optional)
<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:

