



LEGACY GIFT STATEMENT OF INTENT



Thank you for your generous commitment to your community and La Crosse Area Community Foundation. To better understand your intentions for this gift, we ask that you please complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Questions? Please call the Foundation's Executive Director at 608.782.3223 ext. 22.

Your Contact Information

Name(s) _____

Address _____

City _____ State _____ Zip _____

Preferred phone _____ Email(s) _____

Type of Legacy Gift

If you are willing to disclose information about your gift, please check all that apply. If you choose to provide an estimate of the value of your gift, please use today's dollars.

- Will Trust IRA or Retirement Plan Assets Charitable Remainder Trust
- Life Insurance Policy Charitable Gift Annuity Other: _____

Optional: The approximate value of my gift is \$_____ or _____% of my estate or residue.

Your Gift Preferences (Must equal 100%)

- ___% Highest priorities of LCF at time gift is received (unrestricted)
- ___% Community Giving Fund (endowed unrestricted fund for competitive grantmaking)
- ___% An Existing Agency, Scholarship or Field of Interest fund at LCF: _____
- ___% A new named fund (see attached fund agreement, or contact LCF to draft one)
- ___% Other: _____

Your 'Forever Society' Recognition Preferences

LCF may recognize this gift now in the Forever Society List. Please list my/our names as:

- _____
- Anonymous forever
- Only anonymous until gift is received

Signature(s): _____ **Date:** _____



Alternative/Additional Directions:

Sample Language to include a planned gift as part of your will:

I/we bequeath to La Crosse Community Foundation (tax ID#39-6037996), located in La Crosse, Wisconsin, ____% of my residue estate — OR — the sum of \$_____ to be used for charitable purposes set forth in a Statement of Intent and/or Fund Agreement held on file by La Crosse Area Community Foundation.

Please return completed and signed form to:

La Crosse Area Community Foundation
601 7th Street N, Suite 203
La Crosse, WI 54601

Questions?

Call (608) 782-3223