Legacy Society Intention Form

Please enroll me in the Legacy Society. I/We have made the following provision for a planned gift to Williamsburg Community Foundation:

☐ Bequest through a will or trust  ☐ Life Insurance

☐ Retirement Plan Assets  ☐ Charitable Remainder Trust

☐ Charitable Gift Annuity  ☐ Charitable Lead Trust

☐ Other______________________________

Gift Information

The approximate value of this gift is $ _________________ (Optional – Providing this information helps us to plan for the future.)

☐ It is my/our intention that this gift be unrestricted.

☐ It is my/our intention that this gift be added to the following existing fund at the Williamsburg Community Foundation:

______________________________________________________________

☐ It is my/our intention that this gift be used to establish a fund at the Williamsburg Community Foundation for the following purposes: ________________________________________________________________

____________________________________________________________________

Donor Appreciation

☐ When recognizing this gift, the Foundation is authorized to acknowledge in its publications and at events the following donors as members of the Legacy Society:

____________________________________________________________________

☐ I/We have made provisions for a gift, but prefer confidentiality and do not wish to be listed as a member of the Legacy Society.
I/we worked with the following professional advisor when establishing this gift:

Name: ____________________________  Profession: ____________________________

Address: ________________________________________________________________

City: ____________________________  State: ___  Zip: __________________________

____________________________________  ______________________  __________
Signature of donor  Date  Birth date

____________________________________  ______________________  __________
Signature of donor  Date  Birth date

Please return your completed form to:

MAIL:
Williamsburg Community Foundation
1323 Jamestown Rd., Suite 103
Williamsburg, VA 23185

EMAIL:
ncsullivan@williamsburgcommunityfoundation.org