



## 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
- Retirement Plan Assets
- Charitable Gift Annuity
- Other \_\_\_\_\_
- Life Insurance
- Charitable Remainder Trust
- Charitable Lead Trust

### 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](mailto:ncsullivan@williamsburgcommunityfoundation.org)

