



FREMONT AREA COMMUNITY FOUNDATION, INC.

Providing information about your bequest or estate gift to the Fremont Area Community Foundation enables us to plan and administer your gift in accordance with your wishes. It is helpful, but not a requirement, for us to have on file any supporting documentation that you are willing to share with us. Such documentation might include a copy of the relevant pages of your will or trust, or your beneficiary designation form. Additionally, the Fremont Area Community Foundation respectfully requests notification should you make changes or adjustments to your planned gift. Your information will be kept strictly confidential.

—Join the Legacy Society—

The Legacy Society provides a way for the Fremont Area Community Foundation to recognize generous individuals who have made plans to benefit the Fremont area's future. While personal and family obligations should always come first, a planned gift to the foundation is a simple and effective way to create an enduring legacy.

At the foundation, stewardship of your planned gift is incredibly important to us. It is for that reason that we would like to ask for your assistance in completing our records of your Legacy commitment by providing us a copy of the beneficiary form that names the foundation, or other documentation so that we can help ensure that your gift is received by the foundation and managed according to your wishes when the time comes. For example, as beneficiary of a gift such as a life insurance policy, the foundation is the entity which may make the claim, and therefore, in the best stewardship, we want to make sure that our records are accurate and complete.

Providing any of this documentation is entirely voluntary and we respect your privacy if you choose not to share this information with us at this time. We are forever grateful for your commitment to the Fremont Area Community Foundation and the Fremont area. Thank you for entrusting us with the stewardship of your legacy.

If you have made a provision for a planned gift to the Fremont Area Community Foundation and are willing to share this information with us, please complete the back side of this form.

—A Statement of Intent—

Name(s) _____

Address _____ City _____

State _____ Zip _____ Best Phone: _____

I/We have made the following provision for a gift:

- Bequest
- Charitable Gift Annuity
- Charitable Remainder Trust
- Life Insurance
- Other: _____

In recognizing this gift, the Foundation is authorized to list the following name(s) as members of the Legacy Society: _____

I/We have made provision for a gift but prefer confidentiality and do not wish to be listed as a member of the Legacy Society.

It is my/our intention that this gift be added to an existing fund at the foundation (listed below) and governed by all related agreements:

I/We wish to consider a deferred gift and would like to discuss the foundation's gift planning services with a member of the staff.

I/We understand that the Fremont Area Community Foundation's staff are available for consultation. Please ask them to call.

This *Statement of Intent* is non-binding.

Signature(s)

Date