

LEGACY Society



Joining MYC's Legacy Society

Thank you for being part of MYC's past, present, and future through your planned gift--and welcome to MYC's Legacy Society!

Statement of Intent: Recording Your Planned Gift

To better understand the intentions for your planned gift, thank you for completing this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand you may wish to change your gift in the future. Thank you for following through with completing or updating your will or estate plan with this information.

<input type="text"/>	<input type="text"/>	<input type="text"/>
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First

Last

email

<input type="text"/>	<input type="text"/>
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Street or mailing address

City, State and Zip Code

<input type="text"/>	Is there another person associated with this planned gift? (spouse, partner, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
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Phone

Yes

No

Second Person associated with this planned gift: if any data is the same, you may write "same as above"

<input type="text"/>	<input type="text"/>	<input type="text"/>
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First

Last

email

<input type="text"/>	<input type="text"/>
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Street or mailing address

City, State and Zip Code

<input type="text"/>

Phone

(Continued on next page)

Tell us about your planned gift.

We recognize that your assets will change over time and that this plan is based on your knowledge as of today. However you designate your planned gift in your personal documents, thank you for recording that information below.

Planned gift will be designated in
(check all that apply):

- Will
- IRA or other Retirement Plan Assets
- Trust
- Life Insurance Policy
- Other

The approximate value of my planned gift
(record your estimates below, if known)

% as a % of my estate

\$ as a dollar amount

Select one or both options below to help us direct your gift once it is received. If no option is selected, your gift will be directed to the highest priorities of MYC upon receipt (unrestricted).

- MYC Endowment Fund held at Madison Community Foundation
- Highest Priorities of MYC - Designate your gift to be used at MYC's discretion upon receipt

Designate percentages here if choosing both: % MYC Endowment % Highest Priorities of MYC

Acknowledging Your Gift

When you make a planned gift to MYC you are automatically added to MYC's Legacy Society, a notable group of committed, forward-thinking donors who have named MYC as a beneficiary in their estate planning. Please tell us how we may recognize you!

To encourage others to join MYC's Legacy Society, I / We would like to be listed as part of this noteworthy group. (Please record your name(s) below as you wish it to appear.)

Please print

If listed as "Anonymous" for MYC's Legacy Society, may we publicly recognize your gift once it is realized, i.e., after your death? Yes No

Signature

Date