



Legacy Society Notification of Intent

Please call or stop by and return this form to The Community Foundation:
 200 E. Buffalo St. Suite 202 Ithaca, NY 14850
 (607) 272-9333 info@cftompkins.org

To promote sustainable philanthropy in Tompkins County, I have included the Community Foundation as part of my estate plan (not a binding legal obligation).

Information About Donor(s)

Name(s): _____ Street 1: _____

Phone Number(s) (select all that apply): _____ Street 2: _____

Home: _____

Work: _____ City: _____

Cell: _____ State: _____

Fax: _____ ZIP Code: _____

Email Address: _____

Information About Gift

Method of Giving (select one):

I / we have included the Community Foundation in a bequest by (share details, which are useful but not mandatory):

- A specific amount of my / our estate. Amount _____
- A specific percentage of my / our estate. Percentage _____
- The residue of my / our estate.
- I / we wish to keep the value of my / our gift private at this time.

I / we have named the Community Foundation as a beneficiary or contingent beneficiary of:

- My / our 401(k), 403(b), IRA, or other tax-deferred retirement plan.
- My / our life insurance policy.

I / we have included the Community Foundation in my / our estate plan in another way. (please specify):

Please attach a description or a copy of the instructions found in your will or other documents pertinent to the Community Foundation of Tompkins County.

Total Value of Gift(s):

My / our gift is worth approximately: _____ \$ _____

Acknowledgement:

I / we wish my / our name(s) to not be listed in the Legacy Society.

I / we would like to be listed in the Community Foundation of Tompkins County Legacy Society as follows:

Acknowledgement and Certification

Your legacy gift to the Community Foundation of Tompkins County makes you a member of The Legacy Society, an association that honors and recognizes individuals who have confirmed their commitment to the future of Tompkins County by making a planned gift.

Signature of Donor(s): _____ Date: _____

Thank you for your support!