



Legacy Society Notification of Intent

Have questions? Need assistance?
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 Community Foundation as part of my estate plan (not a binding legal obligation).

| Information About Donor(s) | |
|----------------------------|------------|
| Name(s): | Address 1: |
| Phone Number(s): | Address 2: |
| Home: | City: |
| Work: | State: |
| Cell: | ZIP Code: |
| Fax: | |
| Email Address: | |

Information About Professional Advisor(s)
 My / our attorney(s) / financial planner(s) / wealth advisor(s) / tax advisor(s) are (optional; please list):

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 Community Foundation of Tompkins County.

Approximate Value of Gift(s) (optional):

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 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: _____