

Legacy Society

Enrollment Letter

I want to provide a gift for my community by including The Community Foundation of Shelby County in my estate plan. Please enroll the name listed at the bottom of this letter in the Legacy Society of The Community Foundation of Shelby County.

I understand that the gift must adhere to the Gift Acceptance and Fund Acceptance policies of The Community Foundation in effect at the time the gift is received by the Foundation. The Community Foundation will make every effort to use the gift as I direct, but the Foundation has the variance power to make a closely related substitution if the direction is found to be impossible or unnecessary.

I understand that I do not need to disclose my specific intention and that I have been encouraged to seek the advice of my financial or estate planning advisor regarding the gift to The Community Foundation.

Ways to make a gift include, but are not limited to:

- A direct gift of cash or securities;
- Including The Community Foundation of Shelby County in my will;
- Naming The Community Foundation as a primary or secondary beneficiary of a new or existing insurance policy;
- Creating a trust instrument that directs earnings or principle to The Community Foundation according to my predetermined direction.
- Establishing a Charitable Gift Annuity with the remainder benefiting The Community Foundation.

Name as it may appear in publications: _____
Requests for anonymity will be honored.

Signed: _____ Date: _____