



Legacy Society Membership Form

Confidential

I/We have made a provision for The Community Foundation of West Chester/Liberty in my/our will (or other financial or estate planning document) by:

- A bequest in a will or living trust: Specified Amount or Specified Percentage
- Beneficiary or contingent beneficiary of 401(k), 403(b), IRA or other tax-deferred retirement plan
- Beneficiary or contingent beneficiary of a gift of life insurance policy (entire policy or percentage)
- Gift that provides income to me or my family (i.e. charitable trust)
- Gift of cash, stocks, real estate or other personal property
- Other endowment gift or gifts to a specified fund. Please Specify: _____

Approximate or actual gift value, if known: \$ _____

I/We intend for my/our bequest to be designated toward a particular Fund at The Community Foundation of West Chester/Liberty. Name of Fund: _____

I/We intend for my/our bequest to be designated to the establishment of a new fund in my/our honor/memory. Please contact me to establish a Fund Agreement.

I/We intend for my/our bequest to be unrestricted.

Name: _____

Address: _____

Phone: _____ Email: _____

Legal Advisor

Your legacy gift to The Community Foundation of West Chester/Liberty makes you a member of our Legacy Society that honors and recognizes individuals and families who have confirmed their commitment to our community's future by making a planned gift. Please list your name the way you wish to be listed in The Community Foundation of West Chester/Liberty's Legacy Society.

Name/s: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

I/We wish to remain anonymous.

Signature: _____ Date: _____

Signature: _____ Date: _____