



Legacy Circle Gift Intent Form

To help create a lasting impact for our community, I/we are pleased to inform the Community Foundation of South Puget Sound that I/we have included a legacy gift in my/our estate plan. I/we understand that this commitment is revocable and may be changed at any time.

This gift will benefit:

- ☐ The Community Foundation's Programs & Operations
- ☐ The Community Fund – The Community Foundation's Grantmaking Fund
- ☐ A Specific Fund: _____

This gift will be made through the following (check all that apply):

- ☐ Will or Living Trust
- ☐ Retirement Plan Assets
- ☐ Donor Advised Fund
- ☐ Charitable Remainder Trust
- ☐ Life Insurance Policy
- ☐ Real Estate or Other Non-Cash Assets
- ☐ Other: _____

Financial/Legal Advisor Name (Optional): _____

The Current Estimated Value of this Gift is (Optional): _____

Thank you for joining the Legacy Circle! Your legacy gift is a lasting expression of your dedication to our community. As a lifetime Legacy Circle member, we look forward to honoring your generosity through recognition (if you choose), sharing updates and stories about the impact of your gift, and expressing our appreciation for your decision to make a difference for future generations. While we hope your example will inspire others to consider leaving a legacy gift, please know that the value of your gift will always remain confidential.

Recognition Preferences

We are honored to celebrate your generosity. Please let us know your preference:

- ☐ Yes, you may include my/our name(s) in Community Foundation publications.
- ☐ I/We prefer to remain anonymous. Please do not publish my/our name(s) publicly.

Printed Name

Signature

Date

Printed Name

Signature

Date

Please contact me/us at: _____ OR _____
Phone Number Email