The Homer Foundation

Legacy Society Membership Form

Legacy giving is not just about the gift, but the story it tells - of love, compassion, and a desire to make a difference that endures across generations. Through legacy giving, you are able to create a lasting impact on the values and causes you care about - and continue to shape the world long after you are gone.

If you have arranged for a future gift to the Homer Foundation, through a will, trust, life insurance or other similar document, please complete this form and return it to the Homer Foundation.

I/we have named the Homer Foundation in my estate plans as described below:
P*lease print names as you would like them to appear in recognition.*

Full Name: _____

Address: _____

City: _____ State: _____ Zip code: _____

Phone: _____

E-mail: _____

No other information is required, however, it is helpful to know what type of gift you are planning:

- ☐ Charitable Bequest
- ☐ Charitable Remainder Trust
- ☐ Charitable Gift Annuity
- ☐ Beneficiary of Life Insurance
- ☐ Designated beneficiary of a retirement account or 401K
- ☐ Other: _____

Would you like to advise us regarding the approximate value of your gift: Est: _____

If you are willing, for our records only:

Please provide the name & contact for your estate/financial advisor:

Name: _____ Phone: _____ Email: _____

Please describe (or attach a copy of) the instructions found in your will or trust pertinent to the Homer Foundation. We can also help craft a Beneficiary Directive to leave on file with us at the Homer Foundation to assure your wishes are met. This document may be changed or updated at any time.

_____

_____

- ☐ I/we give permission for the Homer Foundation to list my/our name as members of the Legacy Society.
- ☐ I/we have made provisions for a gift but wish to remain anonymous.

Signature: _____ Date: _____

Signature: _____ Date: _____