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Standing Legacy Society***

The Standing Legacy Society recognizes individuals and couples who have notified the M&M Area Community Foundation that they have named the Foundation as the beneficiary of any type of planned or deferred gift.

Joining the Standing Legacy Society requires two steps:

1. Include a charitable bequest designating the Foundation as a beneficiary in your estate plan. Such bequests are generally accomplished by including the Foundation as a beneficiary of:

* A will or trust
* An IRA or 401K retirement plan
* A life insurance policy
* A charitable gift annuity, charitable remainder trust or other planned gift

1. Inform the M&M Area County Community Foundation that you have made the necessary arrangements by returning this form. Returning the completed form to our office will allow us to acknowledge your planned gift.

* I/We have made a provision to include the M&M Area Community Foundation as a beneficiary of my/our estate plans, and wish to be included in the Standing Legacy Society.

The Foundation is authorized to list the following name(s) as members of the Standing Legacy Society:

Please print your name(s) as you would like them to be listed.

* I/We have made a provision to include the M&M Area Community Foundation as a beneficiary of my/our estate plans, but prefer not to be listed as members of the Standing Legacy Society. **The Foundation is authorized, however, to recognize the gift under the title of “Anonymous.”**
* I/We have made a provision to include the M&M Area Community Foundation as a beneficiary of my/our estate plans, but prefer not to be listed as members of the Standing Legacy Society.
* I/We have not yet made provisions to include the M&M Area Community Foundation as a beneficiary of my/our estate plans, but would like additional information about how I/we might utilize the Foundation as I/we consider leaving a legacy gift.

Printed Name Date

City, State, Zip

Signature Phone Email