



## Standing Legacy Society

Becoming a member of 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
  
2. Inform the Community Foundation that you have made the necessary arrangements by returning this form, allowing 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 by name** as members of the Standing Legacy Society. I/We authorize the Foundation 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