

JOINING THE LEGACY SOCIETY



Grand Haven Area
community foundationSM

Our LEGACY SOCIETY recognizes individuals and couples who have notified us that they have included the Foundation in their Will or other deferred giving plan.

HERE'S HOW TO JOIN THE LEGACY SOCIETY – JUST TWO STEPS:

1. **Arrange for your estate to leave a gift to the Foundation.** Common ways to do this are:
 - As a beneficiary of a bequest through your Will or Trust
 - As a beneficiary in an IRA, annuity, or 401K/403B Retirement Plan
 - As a beneficiary or owner of a Life Insurance Policy
 - As a beneficiary of a Charitable Gift Annuity, Charitable Remainder Trust, or other planned gift

**The Community Foundation's Federal Tax ID Number is:
23-7108776**

2. **Inform the Grand Haven Area Community Foundation** that you have made the necessary arrangements by returning this form. This will give us permission to include your name in future listings of *Legacy Society* members.

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I/We have made a provision for the Grand Haven Area Community Foundation in my/our estate plans and wish to be included in the *Legacy Society*.

The Foundation may list the following name(s) as members of the *Legacy Society*

Please print your name(s) as you wish to be listed

I/We have made a provision for a gift, but prefer not to be listed as members of the *Legacy Society*.

I/We have not yet planned for a future gift, but would like more information about how to leave a legacy through our Will or other planned giving arrangement.

Signature

Date

Address

Phone

Email

What is the Legacy Society?

1. The *Legacy Society* recognizes individuals and couples who have named the Grand Haven Area Community Foundation as the beneficiary of any type of planned or deferred gift. The purpose is to acknowledge and thank those who have made these gifts and to encourage and inspire others to do the same.
2. Members of the *Legacy Society* will be recognized in many of our publications. Also, you will be invited when we hold special receptions for the *Legacy Society* members.
3. Joining the *Legacy Society* requires two steps. First, arrange for a planned gift in favor of the Foundation. Second, inform the Foundation by submitting this *Legacy Society* form. These forms are available through many Tri-Cities area attorneys and financial planners, or from the Foundation office or website.
4. We will not ask how much is being left to the Foundation. You are, however, encouraged to discuss your gifts with us to make sure we can comply with your wishes. Your gift will be endowed and grants from it will be made in perpetuity. If you would like to let us know the name you would choose for your Fund and your plans for its distribution, we will file this information confidentially, and you are then assured that your plans will be followed exactly as you have outlined them to us. Your instructions to us can be changed at any time with a simple phone call to the office.
5. Bequests from a Will are the most common way to leave a gift to GHACF; however, some have made the Foundation the beneficiary of 401K/IRA plans or insurance policies. Others have established a Charitable Gift Annuity or a Charitable Remainder Trust in favor of the Foundation. There are many ways to turn a specific asset into a lasting legacy – call us with any questions – 616-842-6378.
6. Finally... Thank you. We are so pleased, through the *Legacy Society*, to recognize the people who are planning for gifts today that will provide significant benefits to our community in the future. Because of the generosity of people like you, the Tri-Cities will continue to be a wonderful place to call home now and for generations to come!