

CLINTON COUNTY COMMUNITY FOUNDATION, INC.

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# Joining the Legacy Society

## Joining the Legacy Society

To help and encourage our Citizens to remember their community through the Foundation we have started a Legacy Society. The Legacy Society recognizes all those 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 your estate to leave a gift to CCCF: Common ways to do this are:
  - a. Bequest through your will
  - b. IRA/401K designation
  - c. Transfer ownership of Life Insurance policy
  - d. Charitable Trusts (life income arrangements)
    - i. Charitable Remainder Trust
    - ii. Charitable Lead Trust
    - iii. Charitable Gift Annuity
  - e. Estate Note/Deferred Pledge Agreement (available from CCCF office)
  - f. There is NO minimum amount of deferred gift to qualify to be named and published in the Legacy Society.

Note: We recommend that you discuss these options with your family and with your attorney, accountant, insurance agent or financial planner as may be appropriate. You may also contact the Foundation office to discuss the various ways to leave your legacy through the Community Foundation

2. Inform the Clinton County Community Foundation that you have made the necessary arrangements by returning the form below. This will give us permission from you to disclose your name in future listings of Legacy Society members.

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**The Legacy Society**

I/We have made provision for the Clinton County Community Foundation in my/our estate plans and wish to be included in the Legacy Society. I/We agree to be named in published listings of the Society members.

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please print name(s) as you wish to be listed

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Signature

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Date

