



Whidbey Community Foundation
PO Box 1135
Coupeville, WA 98239
Email: info@whidbeyfoundation.org
Website: www.whidbeyfoundation.org

Legacy Society – Statement of Intent

The Legacy Society provides a way for Whidbey Community Foundation to recognize generous individuals who have made provisions in their planned gifts to benefit Whidbey Island’s future. These donors understand that a planned gift to the Foundation is a simple way to contribute to the future well-being of Whidbey Island and the possibility to create a favorable tax situation. We thank those who have notified us of funds to be contributed to the Foundation in the future. If you have made provisions for a deferred gift to Whidbey Community Foundation, please complete this form and return to the mailing address or email address listed above.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

I/We have made the following provision for a gift:

- | | |
|--|---|
| <input type="checkbox"/> Bequest through a will or trust | <input type="checkbox"/> Life Insurance |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Other _____ |

___ In recognizing this gift, the Foundation is authorized to list the following name(s) as members of the Legacy Society: _____

___ I/We have made a provision for a gift but prefer confidentiality and do not wish to be listed publicly as a member of the Legacy Society.

___ It is my/our intention that this gift be added to an existing fund at the Foundation and governed by all related agreements.

Fund Name: _____

___ It is my/our intention that this gift be used to create a new fund at the Foundation. Please contact me/us about the nature and details of that fund.

This “Statement of Intent” is non-binding and non-obligatory. You may notify Whidbey Community Foundation if you choose to remove this provision.

Signature: _____ Date: _____