



What is the Legacy Society?

The Princeton Area Community Foundation established the Legacy Society to recognize people who are planning gifts today that will provide significant benefits to our community in the future. These gifts may take the form of bequests, charitable remainder trusts, gifts of life insurance, or other charitable planned gift.

Our community is already the beneficiary of thousands of gifts entrusted to the Community Foundation by generous people. Sometimes such gifts go unrecognized because they come at the end of the donor's life. The Legacy Society provides a way for the Community Foundation to recognize and thank donors during their lifetimes, and to design plans for funds that result from such gifts.

Members of the Legacy Society are recognized in the Community Foundation's printed materials and invited to periodic events. Community Foundation staff is available to Society members and their professional advisors to discuss estate and gift planning questions and concerns.

How do I become a member?

You are already eligible for membership in the Legacy Society if you have made arrangements in your will or through some other form of deferred giving, for a gift to the Princeton Area Community Foundation. Simply notify us of your plans by completing the form on the back of this sheet and returning it to us.

You may tailor your charitable gift to fit your personal situation. We can help determine a plan that works for you. Your current or future gifts of cash, securities, real estate or other resources can help our community and initiate your membership in the Legacy Society.

Once we know your intentions, we can assist you in making more precise arrangements for how the Community Foundation will use your gift. We would be happy to work with you and your professional advisor to structure a gift that provides broad support, focuses on a particular field of interest (such as education, the arts, etc.) or is designated in a way you specify. Please call us at 609-219-1800 to discuss the various planned giving options available to you.

OVER

Legacy Society

If you have made plans or provisions for a future gift to the Princeton Area Community Foundation, welcome to the Legacy Society. We would like to recognize your generous spirit. Please complete the form below and return to:

Princeton Area Community Foundation
212 Carnegie Center, Suite 201
Princeton, NJ 08540

Name(s) _____

Address _____

City _____

State _____ Zip _____ Phone _____

If you've already made provisions for a gift... *(please check all that apply)*

I have provided for the Princeton Area Community Foundation in my estate plans in the following way:

Gift Type:	Approximate Gift Value (optional)
<input type="checkbox"/> Bequest or revocable trust	\$ _____
<input type="checkbox"/> Charitable Remainder Trust – Irrevocable beneficiary	\$ _____
<input type="checkbox"/> Charitable Remainder Trust – Revocable beneficiary	\$ _____
<input type="checkbox"/> Beneficiary of a life insurance policy	\$ _____
<input type="checkbox"/> Beneficiary of IRA or qualified retirement plan	\$ _____

Please credit my gift to the following:	% Percentage:
<input type="checkbox"/> The _____ Fund at the Community Foundation	_____ %
<input type="checkbox"/> A Fund to support community grantmaking	_____ %
<input type="checkbox"/> A Fund to address the area of greatest need	_____ %
<input type="checkbox"/> The Community Foundation's operating endowment	_____ %

Total: _____ 100 %

Please describe (or attach a copy of) the instructions found in your will or trust pertinent to this gift:

I/we authorize the Community Foundation to list the following name (s) as Legacy Society members:

I/we have made provisions for a gift, but do not wish to be listed as members at this time.

I would like to share my story in the Community Foundation's annual report or other publication.

Signature and date _____ This Statement of Intent is non-binding.