Legacy Giving

Legacy Gift Intent Form

Community Foundation OF SOUTHWEST INDIANA

Donor Information	
Name	
Address	
Phone	
Email	
Existing Fund (If Applicable)	
Fund Name	
Fund Number	

Planned Gift Information

- ☐ I have already included the Community Foundation of Southwest Indiana in my estate plans.
- ☐ I intend to include the Community Foundation in my estate plans.

Type of Gift (Check All That Apply):

- ☐ Will
- ☐ Revocable living trust
- ☐ Retirement account beneficiary
- ☐ Life insurance beneficiary
- ☐ Charitable remainder trust
- ☐ Charitable lead trust
- ☐ Other:

_____

Gift Designation

- ☐ Add to my existing fund
  Fund Name: _____
- ☐ Create a new fund (Contact me to dicuss options)

Estimated Gift

Amount or Percentage (Optional):

Recognition

- ☐ Recognize me/us as Legacy Society members
  Refer to me/us as: _____
- ☐ I prefer to remain anonymous.

Questions?

For questions regarding legacy giving, contact Aimee Stachura, Chief Development Officer, at **astachura@cfswi.org** or **812.429.1191**.

This form is intended to notify the Community Foundation of Southwest Indiana of my current charitable intentions. It is not a legal obligation and may be changed or revoked by me at any time.