



LEGACY SOCIETY

*A legacy that
continues to grow.*

The values you share today can inspire
generosity for generations to come.



Community Foundation
OF SOUTHWEST INDIANA

cfswi.org/legacy-giving

Your legacy can live on.

Every endowed fund tells a story. A family honoring a loved one. A donor investing in opportunity. A business giving back to the community that helped it grow.

Over time, many donors choose to take the next step by including CFSWI in their estate plans, helping to grow the charitable legacy they have already created and ensuring that future generations continue to benefit from the causes they value most.

*"It was easy.
I just worked with the
Community Foundation
and my advisor to make
the Community Foundation
the beneficiary of an
investment."*

Legacy giving can take many forms.



Will or Trust

Include CFSWI in your estate plans.



Retirement Assets

Name CFSWI as a beneficiary.



Life Insurance

Designate CFSWI as a beneficiary.



Other Assets

Explore giving strategies with your advisor.



Already have a fund with CFSWI?

Including your existing fund in your estate plan can be a natural extension of the legacy you have already created. An endowed fund provides annual impact today. A future gift can help ensure that impact continues to grow for generations to come.

Join the Legacy Society

The CFSWI Legacy Society recognizes individuals and families who have included the Community Foundation in their estate plans or made another qualifying planned gift.

Legacy Society members receive:

- Legacy Society lapel pin
- Invitations to Legacy Society gatherings
- Updates on the impact of planned gifts
- Opportunities to connect with fellow legacy donors
- Recognition, if desired



Let's talk about your legacy.



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