



community foundation

Oceana County

For good. For ever.

Community Foundation *for* Oceana County

PO Box 367 • Shelby, MI 49455 • 231-861-8335

Joining the Legacy Society

The **Legacy Society** recognizes individuals and couples 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 the Foundation. Common ways to do this are:
 - As a beneficiary of a bequest through your Will or Trust
 - As a beneficiary in an IRA or 401K Retirement Plan
 - As a beneficiary or owner of a Life Insurance Policy
 - As a beneficiary of a Charitable Gift Annuity, Charitable Remainder Trust, or other planned gift
2. Inform the Community Foundation *for* Oceana County that you have made the necessary arrangements by returning this form. This will give us permission to include your name in future listings of the **Legacy Society** members.

The Legacy Society

- I/We have made a provision for the Community Foundation *for* Oceana County in my/our estate plan and wish to be included in the Legacy Society.

The Foundation may list the following name(s) as members of the **Legacy Society**.

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

- I/We have made a provision for a gift, but prefer to not be listed as members of the **Legacy Society**.
- I/We have not yet planned for a future gift, but would like more information on how to leave a legacy through our Will or other planned giving arrangement.

Signature

Date

Phone

Address