Legacy Society Membership Form

TRUCKEE TAHOE COMMUNITY FOUNDATION
uncommon people common ground

Confidential

The Legacy Society recognizes individuals who have invested in the future of Truckee-North Tahoe through deferred gifts to Truckee Tahoe Community Foundation.

I/We accept membership in Truckee Tahoe Community Foundation's Legacy Society through the following commitment (please check one):

- ☐ Will
- ☐ Revocable Living Trust
- ☐ Life Insurance Beneficiary
- ☐ Retirement Plan Beneficiary
- ☐ Irrevocable Trust Beneficiary
- ☐ Personal Property
- ☐ Securities
- ☐ Charitable Remainder Trust
- ☐ Charitable Lead Trust
- ☐ Charitable Gift Annuity
- ☐ Remainder Interest in full time residence or vacation property
- ☐ Cash
- ☐ Other provisions as described below:

_____

☐ description or documentation is attached.

Designation: ☐ Area of Greatest Need ☐ Other _____

The estimate current value of my/our future gift to the Foundation is $_____

(5% of your initial gift and 1% annually is used to support Foundation operations)

Name(s): _____

Home Address: _____

City: _____ State: _____ Zip Code: _____

Email address(es): _____ Phone: _____

Professional Advisor's Name (CPA, attorney, broker): _____

☐ I/We would be pleased to be listed as member(s) of TTCF's Legacy Society to serve as encouragement for others to give. My/Our name(s) should appear as follows:

_____

☐ I/We would prefer to remain anonymous.

_____ _____ _____

Signature *Date* *Birthdate*

_____ _____ _____

Signature *Date* *Birthdate*

Completion of this form is not intended to be legally binding: it is a good faith statement of my/our intent.

Please return to: TTCF P.O. Box 366, Truckee, CA 96160. You may also contact Lisa Dobey, CEO, at 530-587-1776 or lisa@ttcf.net. TTCF is a 501(c)(3) organization under IRS regulations. Tax ID # 68-0416404