

Legacy Society - Statement of Intent

The Legacy Society provides a way for The Community Foundation of Middle Tennessee to recognize generous individuals who have made plans to benefit this area's future. These donors understand that a planned gift to The Foundation is a simple way to contribute to the future well-being of all Middle Tennesseans and to create a favorable tax situation, we thank those who have let us know of funds to be given to The Foundation in the future. If you have made provision for a deferred gift to The Community Foundation of Middle Tennessee, please complete this form.

Name _____

Address _____

Phone _____

City _____ State _____ Zip _____

I/We have made the following provision for a gift:

- _____ Bequest
- _____ Charitable Remainder Trust
- _____ Life Insurance
- _____ Other _____

_____ In recognizing this gift, The Foundation is authorized to list the following name(s) as members of The Legacy Society: _____

_____ I/We have made provision for a gift but prefer confidentiality and do not wish to be listed as a member of The Legacy Society.

_____ It is my/our intention that this gift be added to an existing fund at The Foundation and governed by all related agreements.

Fund Name: _____

_____ It is my/our intention that this gift be used to create a new fund at The Foundation. Please contact me/us about the nature of that fund.

This "Statement of Intent" is non-binding. I will notify you if I remove this provision.

SIGNATURE: _____ DATE _____