



FORT ATKINSON
COMMUNITY FOUNDATION

Tell Us About Your Legacy Gift

Statement of Intent

Thank you for your commitment to the Fort Atkinson Community Foundation (FACF). To better understand your intentions for this gift, we ask that you complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Questions? Please call FACF at (920) 563-3210.

Your Contact Information

Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email: _____

About Your Gift - I have included FACF in my estate plan by including it in my (check all that apply):

Will Trust IRA or Retirement Plan Assets Life Insurance Policy

Investment Account Other _____

If you are willing to provide an estimate of the value of your gift, please use today's dollars:

The approximate value of my gift is: \$ _____ or _____% of my estate or residue

Your Gift Will Support

\$ or % _____ General Fund—unrestricted, able to respond to changing needs of community.

\$ or % _____ An Existing Fund held at FACF _____
Fund name

\$ or % _____ A new Fund named: _____
(FACF will work with you on the details)

%s must add up to 100%

Acknowledging Your Gift & Bur Oak Society

FACF may publicly acknowledge my/our gift. Please list our names as:

Anonymous If anonymous, you may publicly recognize my/our gift once it is realized.

My/Our legacy gift will create or add to a permanent endowment fund at FACF, and I/we would like to become a member of FACF's Bur Oak Legacy Society.

Signature(s): _____ Date: _____

Please return completed form to 244 N. Main St., Fort Atkinson, WI 53538 or facf@fortfoundation.org

Fort Atkinson Community Foundation (tax ID# 39-6220899)