



Legacy

Leave your legacy for a better tomorrow

Together we can help you create a legacy of giving

Naming the Community Foundation as one of your beneficiaries is as easy as adding a few lines to your will or trust, or amending your life insurance or IRA designation. You can create a charitable legacy today that will live on long past your lifetime.

How does it work?

Outright Gift: You can make a gift of cash, stocks, bonds or other assets to RCCF. Your charitable gift qualifies for tax advantage under federal law.

Bequest by Will: You can designate a gift or portion of your estate to RCCF and in some cases, receive a substantial reduction in federal gift and estate taxes.

Beneficiary Designation: You can designate RCCF as the beneficiary of all or part of your IRA or life insurance policy (using beneficiary designation form provided by your custodian). The full value of the gift is transferred tax-free at your death and your estate receives an estate tax charitable deduction.

Charitable Gift Annuity: You can make a gift of cash or property to RCCF now, get immediate tax benefits and ensure that you or a loved one receive fixed quarterly or annual income payments for life.

Bequest Language

A bequest is simple and convenient. You have a number of options. The following examples are intended to help you and your attorney in drafting a bequest that meets your charitable interests.

1. Bequest of a Specific Dollar Amount

"I hereby give, devise and bequeath [Bequest Amount] to Roscommon County Community Foundation, a non-profit organization located at 3975 W Federal Hwy Roscommon, MI 48653, Federal Tax ID: 38-3612480, for Roscommon County Community Foundation's [Name of Fund] Fund."

2. Bequest of Specific Personal Property

"I hereby give, devise and bequeath [Property Bequest] to Roscommon County Community Foundation, a non-profit organization located at 3975 W Federal Hwy Roscommon, MI 48653, Federal Tax ID: 38-3612480, for Roscommon County Community Foundation's [Name of Fund] Fund."

3. Bequest of Specific Real Estate

"I hereby give, devise, and bequeath all of the right, title, and interest in and to the real estate located at [Bequest Real Estate] to Roscommon County Community Foundation, a non-profit organization located at 3975 W Federal Hwy Roscommon, MI 48653, Federal Tax ID: 38-3612480, for Roscommon County Community Foundation's [Name of Fund] Fund."

4. Bequest of Percentage of an Estate

"I hereby give, devise, and bequeath [Bequest Fraction of Residuary] Roscommon County Community Foundation, a non-profit organization located at 3975 W Federal Hwy Roscommon, MI 48653, Federal Tax ID: 38-3612480, for Roscommon County Community Foundation's [Name of Fund] Fund."

Disclaimer: The information in this planned giving form is intended to assist you in your charitable planning. It is not legal advice and should not be relied upon as such. Please consult with your attorney or other advisor for professional advice and to discuss how this information can benefit you as you consider your financial and philanthropic goals.

Statement of Intent

If you choose to direct a bequest to the Community Foundation, we encourage you to share your plans with us. Your Plans will remain confidential, and we are able to ensure that when the time comes, the Community Foundation understands and honors bequest instructions.

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

I/we have made provisions for a future gift to Roscommon County Community Foundation by:

☐ Bequest through Will or Trust: _____

☐ Charitable Gift Annuity: _____

☐ Charitable Remainder Trust: _____

☐ Life Insurance: _____

☐ Other: _____

The Roscommon County Community Foundation has permission to publicly recognize the following name(s) as donors to the Foundation

☐ I/we have made provisions for a gift but prefer confidentiality.

☐ My/ our charitable interests are: _____

This "Statement of Intent" is non-binding.

(Date)

(Signature)