



**THE LEGACY SOCIETY
Statement of Planned Gift Intention**

Thank you for your intention to include the Idaho Community Foundation as a partner in your estate plans. We ask you to please complete this form with as much information as you are comfortable sharing about your charitable giving fund. Any information about your planned gift does not create a binding obligation.

The Idaho Community Foundation created the Legacy Society to honor those who have committed future philanthropic support to Idaho communities in partnership with ICF. Your planned gift will shape the future of Idaho and support the community organizations and causes that are meaningful to you.

Name of Legacy Fund: _____

Purpose of Legacy Fund. It is my wish that the gift be used:

- For Idaho's greatest needs, as determined by the Idaho Community Foundation
- To support the work of a specific organization(s). Please specify: _____

- To support a cause (arts, education, etc.) or region/county of Idaho. Please describe: _____

- To create a scholarship. Please describe: _____

Your Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Date(s) of Birth: _____

I/we have made provisions for a gift to the Idaho Community Foundation through a:

- Outright Bequest in my will
 - Specific dollar amount: \$ _____
 - Percentage of estate: _____%
 - Specific property: _____

- Trust arrangement under my will with Idaho Community Foundation as a remainderman or co-remainderman. Please describe the conditions of the trust, including ages of income beneficiaries.

- Life Insurance Policy: \$ _____

- Retirement assets in which the Idaho Community Foundation is named as a beneficiary. Estimated Value: \$ _____

- Other (Please describe): _____
Estimated Value: \$ _____

Please let us know if you would like to be recognized as a **public** or **non-public** member of the ICF Legacy Society:

- Public Legacy Society Member. Name will appear in member lists. Name(s) should appear as follows: _____
- Non-Public Legacy Society Member: Name will be excluded from member lists.

This “Statement of Planned Giving Intention” is non-binding. For record-keeping purposes we would appreciate **a copy of the section of your will, trust or other document**, if available, which substantiates the provision(s) listed above. We will keep the information in a confidential file. In the event your estimated provisions change, we would appreciate you notifying us of such a change. *Any action that affects your overall estate plans should be discussed with your professional advisors.*

Date: _____

Signature: _____

Signature: _____

Please return the completed form to info@idahocf.org or Idaho Community Foundation, 210 West State Street, Boise, ID 83702. For more information: info@idahocf.org or 208-342-3535.

We’d love to know a little more about you. Please share your story with us on the next page.

Please tell us why you chose to create a Legacy Fund at the Idaho Community Foundation.

What is important for us to know about your Legacy Fund and/or the organization, cause, region or scholarship recipients it will benefit?

What led you to choose the organization, cause, region or scholarship recipients that will benefit from your Legacy Fund?

How did you learn about ICF Legacy Funds?

Anything else you'd like to share about yourself or the organization, cause, region or scholarship recipients that will benefit from your Legacy Fund?

May we share your story?