



Community Foundation of Northeast Iowa Legacy Society Notice of Intent

The Community Foundation of Northeast Iowa, and our county Affiliate Community Foundation partners, seek to document all those who have included the Community Foundation in their will, living trust or other deferred giving plan for our records and planning.

To serve as notice and advice to your estate planning advisor and the executor of your estate, this non-binding Letter of Intent represents your preference that the gift described below will be made to the Community Foundation of Northeast Iowa in the form of a new fund, or will be added to an existing fund.

It is my/our intention to update my/our estate plan at the next available opportunity, with the following provisions:

I/we intend to provide a gift in the form of:

- | | |
|--|---|
| <input type="checkbox"/> ___ per cent of the estate. | <input type="checkbox"/> real estate. |
| <input type="checkbox"/> an amount to be specified by heirs. | <input type="checkbox"/> a specific dollar amount to be specified in the estate plan. |
| <input type="checkbox"/> from a retirement account. | <input type="checkbox"/> other (please specify) _____ |
| <input type="checkbox"/> from a life insurance policy. | |

We encourage you to discuss these plans with your family and with your professional advisor. You may also contact our office to discuss other ways to leave your legacy through the Community Foundation.

If known, please fill out the following:

I/we intend to make a gift to or designate the Community Foundation as a beneficiary to create a fund which will be known as the _____ Fund.

OR

I/we intend to make a gift to or designate the Community Foundation as a beneficiary to create a/an

- | | | |
|--|---|---|
| <input type="checkbox"/> Designated fund | <input type="checkbox"/> Field of interest fund | <input type="checkbox"/> Other (please specify on the line below) |
| <input type="checkbox"/> Community Impact fund | <input type="checkbox"/> Unknown at this time | _____ |

The purpose of my fund (if known) is to benefit: _____
_____.

In addition to these provisions, **I/we wish to be included in the Legacy Society** and agree to be included in published listings of the Legacy Society's members.

- Yes
- No. I/we would like to remain anonymous and do not wish to be listed as a part of the Legacy Society members list.

I/we hereby state the intent to make a gift to the Community Foundation of Northeast Iowa from my/our estate in accordance with the provisions stated above.

_____/_____/_____
Name(s) (printed) _____ Date

_____/_____/_____
Signature(s) _____ Date