



CONFIRMATION OF YOUR PLANNED GIFT FOR WHITEFISH COMMUNITY FOUNDATION

Please let us know about your gift plans.

Bequests, trusts, and other forms of planned gifts have served as the foundation for the growth and success of community foundations. If you have named the Whitefish Community Foundation as a beneficiary in a will, trust, retirement plan, or some other deferred giving vehicle, we hope you will share this good news with us.

This record will help to ensure that your wishes are fulfilled, and it will also allow us to honor you as a member of the Legacy Society, which recognizes friends who have provided for the future of Whitefish through their estate plan or some other form of deferred gift.

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Phone(s): \_\_\_\_\_

Email Address(es): \_\_\_\_\_

Please describe your deferred gift (and/or attach a copy of documentation):

- Will       Revocable "Living"       IRA or Other Retirement Account       Donor Advised
- Charitable Remainder Trust       Life Insurance Policy       Other:

How would you like Whitefish Community Foundation to use your gift? Unrestricted gifts are used by the community foundation to address its most pressing needs at the time of receipt. You can direct it to the Permanent Endowment Fund where the interest annually helps to fund the Community Grants Program benefiting local nonprofits. You may also direct your gift to support areas that speak to your own passions through Field of Interest Funds. Or, your gift can be endowed and the interest directed to benefit a designated group of nonprofits in your name in perpetuity.

We welcome the opportunity to talk with you about all your giving options. For more information, please contact Alan Davis at 406-863-1781 or alan@whitefishcommunityfoundation.org.

May we include your name(s) in periodic publications and lists of the Legacy Society?

Yes, you may print my/our name(s) in the Legacy Society Publications.

No, I/we ask to remain anonymous.

Signature: \_\_\_\_\_ Signature \_\_\_\_\_ Date: \_\_\_\_\_

This document does not bind you or your estate.

By signing this form, you are simply acknowledging your current plans to benefit Whitefish Community Foundation in the future and giving us guidance as to your wishes. The community foundation recognizes that gift plans may change overtime, and we hope you will consider notifying us of any relevant changes in your plans. We very much appreciate your expression of support. Please return your completed form to: Alan Davis, President/CEO at address listed below.

P.O. Box 1060, 214 2nd Street West Whitefish, Montana 59937 Telephone: (406) 863-1781  
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