The Denison Legacy Society

What is the Denison Legacy Society?

The Denison Legacy Society was established in honor of Rollie and Olga Denison, who gave so bountifully of their time and resources to our community. Today, the Denison Legacy Society recognizes individuals and couples who have named the Mt. Pleasant Area Community Foundation as the beneficiary of any type of planned or deferred gift. Members of the Denison Legacy Society are recognized in Foundation publications and invited to events throughout the year, including special receptions held periodically for Legacy Society members.

How it Works

- You include the Mt. Pleasant Area Community Foundation in your will as a bequest.
- You determine how your gift will benefit our community.
- Upon your death, your gift will be placed in either a "named" fund that you have established or in one or more of the existing funds that you have chosen.
- Grants will be made annually in the name of any fund you have established or contributed to.
- Your gift becomes a permanent source of community capital, helping to do good work forever.

There are many ways to leave a planned gift to the Foundation. Bequests from a will are the most common, but others have made the Foundation the beneficiary of 401K/IRA distributions, insurance policies, charitable gift annuities, or charitable remainder trusts. When comparing options, please note that administrative fees and costs may vary among different types of planned gifts. Each approach qualifies a person or couple for membership in the Denison Legacy Society.

Sample Language for Your Will

Specific bequest – You designate that the Mt. Pleasant Area Community Foundation is to receive a specific dollar amount or specific property.

> *"I give to the Mt. Pleasant Area Community Foundation (Tax ID 38-2951873), (here you insert a specific dollar amount or specific property) to be held, administered and used by its Board of Trustees for support of its grantmaking and programming in the areas of greatest need and opportunity."*

Residuary bequest – You give the Mt. Pleasant Area Community Foundation all (or a portion) of your property, after all debts, taxes, expenses, fees, and all other bequests (including family members) have been paid.

> *"I give to the Mt. Pleasant Area Community Foundation (Tax ID 38-2951873), (here you insert a specific dollar amount, a percentage, or the rest or residue of your estate) to be held, administered, and used by its Board of Trustees for support of its grantmaking and programming in the areas of greatest need and opportunity."*

Thank you for your commitment to our community's future. Through the Denison Legacy Society, we gratefully recognize those who are planning gifts today that will provide significant, lasting benefits to generations to come. Your generosity ensures the Mt. Pleasant area remains a wonderful place to call home—now and forever.

Join the Denison Legacy Society

The ***Denison Legacy Society*** recognizes individuals and couples who have notified us that they have included the Foundation in their estate plan or other deferred giving plan.

To join the ***Denison Legacy Society*** – it takes just two steps:

1. Arrange your estate to leave a gift to the Foundation
   Common ways to do this are:
   - As a beneficiary of a bequest through your Will or Trust
   - As a beneficiary in an IRA or 401K Retirement Plan
   - As a beneficiary or owner of a Life Insurance Policy
   - As a beneficiary of a Charitable Gift Annuity, Charitable Remainder Trust, or other planned gift
2. Inform the Mt. Pleasant Area Community Foundation that you have made the necessary arrangements by returning this form. By executing and returning this form, we may acknowledge your gift and include your name in future listings of the Denison Legacy Society members.

☐ I/We have made a provision for the Mt. Pleasant Area Community Foundation in my/our estate plans and wish to be included in the Denison Legacy Society.

The Foundation may list the following name(s) as members of the Denison Legacy Society:

_____

Please print your name(s) as you wish to be listed.

☐ I/We have made a provision for a gift but prefer not to be listed as members of the ***Denison Legacy Society***.

☐ I/We have not yet planned for a future gift but would like more information on how to leave a legacy through our estate plan or other planned giving arrangements.

☐ I/We would like to add our future gift to an existing fund _____ or create a new fund _____ (please select type of fund).

☐ Donor Advised ☐ Scholarship ☐ Designated ☐ Field of Interest ☐ Community Impact

☐ Optional – I/We have made a provision for a gift, and the estimated value is _____.

_____

Signature(s) Date Email Address

_____

Signature(s) Date Email Address

_____

Address Phone Number