



Legacy Society Questionnaire

We encourage you to discuss these plans with your family and your Professional Advisor (including, but not limited to, your financial advisor, attorney, accountant, etc.). This questionnaire indicates your desire to participate in the Waterloo Community Foundation's Legacy Society. It is not legally binding.

As an expression of my commitment to the Waterloo Community Foundation and building a better future for Waterloo, I will offer a planned gift through¹:

- | | |
|--|--|
| <input type="checkbox"/> A bequest in my will or living trust | <input type="checkbox"/> A charitable gift annuity |
| <input type="checkbox"/> A charitable trust | <input type="checkbox"/> A life insurance policy |
| <input type="checkbox"/> A gift of real estate, securities or other property | <input type="checkbox"/> A retirement plan |
| | <input type="checkbox"/> Other _____ |
- Please call me to discuss the items I have checked above.
- I have enclosed a copy of my planned giving instrument (e.g. will, trust, etc.)

Name of Professional Advisor assisting with this gift: _____

The approximate value of my gift is: \$_____ (optional)

This gift will be used:

- As an unrestricted gift for _____
- To add to an existing fund: _____ (name of fund)
- To create a new fund: _____ (name of fund)

Name Date of Birth

Street Address City State Zip Code

Phone Email

Signature Date

(Over)

¹ The Waterloo Community Foundation accepts gifts of cash or publicly-traded securities. Pursuant to the Gift Acceptance Policy, prior Board approval is need in order to accept gifts including real property, personal property, in-kind gifts, non-liquid securities, and contributions whose sources are not transparent or whose use is restricted in some manner.



Regarding Waterloo Community Foundation Legacy Society publicity, I have the following preference:

- I would like to remain anonymous.
- To encourage others to participate, I give permission for the Waterloo Community Foundation to list me as a member of their Legacy Society. Please acknowledge me as:

Name as you wish to appear

Questions? Please contact Erin Tink, Executive Director, at 319-883-6022 or erin.tink@wloocommunityfoundation.org.

Please return completed form to:

Waterloo Community Foundation
P.O. Box 1253
Waterloo, IA 50704