



Joining The Legacy Society

The Community Giving Foundation Legacy Society honors those who have included a planned gift to any of the current funds or will use a planned gift to establish a fund at the Community Giving Foundation or one of our affiliates in Berwick, Bloomsburg, Danville, Selinsgrove, or Sunbury.

It only takes two steps to join the Legacy Society:

1. Arrange through your estate to leave a gift. Common ways to do this are:
 - Bequest through your will or trust
 - IRS/401K designation
 - Life Insurance policy beneficiary designation
 - Charitable Trusts (life income arrangements): Charitable Remainder Trust, Charitable Lead Trust, or Charitable Gift Annuity
 - Estate note/deferred pledge agreement (available from the Foundation office)

Note: We recommend that you discuss these options with your family and with your attorney, accountant, insurance agent or financial planner as may be appropriate. You may also contact the Foundation office to discuss the various ways to leave your legacy through the Foundation.

2. Inform the Community Giving Foundation that you have made the necessary arrangements by returning the form below. This will give us permission to include your name in future listings of Legacy Society members.

Community Giving Foundation Legacy Society

I/We have made a provision in my/our estate plans for the benefit of Community Giving Foundation (unrestricted fund, endowed fund, or affiliate foundation) _____ and wish to be included in the Legacy Society. I/We agree to be included in published listings of Legacy Society members.

Name (print): _____

Date: _____ Signature: _____

Name (print): _____

Date: _____ Signature: _____

The official registration and financial information of the Community Giving Foundation may be obtained from the PA Dept. of State by calling toll free within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

Key Points About The Legacy Society

1. The Legacy Society is a list of those who have named the Community Giving Foundation or any of its funds or affiliate foundations as the beneficiary of any type of planned or deferred gift—and who choose to be listed
2. Legacy Society forms are available through the Foundation office.
3. There is no minimum amount needed to qualify. Only that you have made the necessary arrangements and are willing to be listed.
4. Legacy Society members may designate the use of the distributions from their future gifts or may leave the distributions to the discretion of the Community Giving Foundation Board of Directors. A Legacy Society gift may be used to establish a new named fund (if minimum fund requirements are met) or may be added to any of the Foundation's existing funds or affiliates. Learn more at csgiving.org/giving/your-legacy.
5. We do not ask how much is being left to the Foundation. We encourage donors to discuss their gifts with us to make sure we can comply with their wishes, but this is not mandatory.
6. Bequests are the most common method used to leave a gift to Community Giving Foundation. However, you may also make the Foundation the beneficiary of 401K/IRA plans, insurance policies, establish a charitable trust in favor of the Foundation, sign a deferred pledge and/or use other methods. All can qualify a person or couple for membership in the Legacy Society.
7. Legacy Society members will receive special recognition in appropriate publications and at special events.
8. Gifts supporting the Community Giving Foundation and its funds and affiliate foundations will ensure our ability to create a better future for all of us in our region.

For more information, contact:

Christine Orlando • *Director of Philanthropy*
570-752-3930 ext. 2 • corlando@csgiving.org