

# Homer Foundation Legacy Society

Celebrating generosity. Securing the community's future.

## Legacy Society Membership Request Form

Individuals who make a commitment to the community's future through a planned gift or bequest are invited to join the Homer Foundation's Legacy Society.

If you have arranged for a future gift to the Homer Foundation, through a will, trust, life insurance or other similar document, we would like to shine a light on your generosity and list you as a Legacy Society member. Please complete this form and return it to the Homer Foundation.

I/We have made provisions for a gift to the community through the Homer Foundation.  
*Print names as you would like them to appear in recognition.*

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

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

No other information is required, however, it would be helpful to know what type of gift:

- Charitable Bequest
- Charitable Remainder Trust
- Beneficiary of Life Insurance
- The designated beneficiary of an IRA or 401k
- Other \_\_\_\_\_

Would you like to advise us regarding the approximate value of your gift: \_\_\_\_\_

If you are willing, please describe (or attach a copy of) the instructions found in your will or trust pertinent to the Homer Foundation. We can also help craft a Beneficiary Directive to leave on file with us at the Homer Foundation to assure your wishes are met. This document may be changed or updated at any time.

I/We give permission for the Homer Foundation to list my/our name/s as members of the Legacy Society.

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

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

I/We have made provisions for a gift, but please list us as ANONYMOUS.

