



Legacy Society - Statement of Intent

Thank you for your commitment to the Madison South Rotary Foundation. To better understand your intentions of this gift, we ask that you please complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand you may wish to change your gift in the future.

Questions about this form or recommended language for wills or other legal documents, please contact any current Foundation Board member.

Please return completed form to:

Madison South Rotary Foundation, PO Box 259672, Madison, WI 53725

Completion of this form is an important first step in establishing your legacy gift. Please be sure to work with your professional advisor(s) to include Madison South Rotary Foundation in your estate plan. If your financial advisor or estate planning attorney has any questions they can contact us at the address above. The legal name and tax ID number of the foundation is provided below.

Madison South Rotary Foundation Tax ID: 39-1342489

Contact Information:

Name(s) _____

Address: _____

City: _____ **State:** _____ **Zip** _____

Home/Cell Phone: _____

Email: _____

About Your Gift:

If you are willing to disclose information about your gift, please check all that apply.

☐ Will☐ IRA/Retirement Plan☐ Charitable Remainder Trust☐ Trust☐ Life Insurance☐ Other _____

The approximate value of my gifts is \$ _____ or _____% of my estate or residue in today's dollars. (Optional)

Acknowledgement of Your Gift:

The MSRF would like to acknowledge your gift in our annual report (the dollar value of your gift will remain confidential). Please choose one of the following:

☐ Please list my/our names as: _____☐ Please do not list my/our names in the annual report at this time.☐ You may recognize my/our gift and name once it is realized.**Signature(s):**

_____ **Date:** _____

_____ **Date:** _____