

LET MY LEGACY
make a difference
IN CHESTER COUNTY

TO: Chester County Community Foundation,
28 W. Market Street, West Chester PA 19382
fax (610)696-8213

RE: *Ben Franklin Legacy Society*

— I/We have made a provision for the Chester County Community Foundation in my/our estate plans and wish to be included in the Ben Franklin Legacy Society. Please include me/us in published listings of the Society's members.

NAME:

ADDRESS:

TELEPHONE:

E-MAIL:

- Bequest
- IRA/401K Designation
- Gifts of Securities
- Charitable Gift Annuity
- Charitable Lead Trust
- Charitable Remainder Trust
- Real Estate
- Other

For more information about current or future contributions, please contact Beth Harper Briglia, Vice President of Donor Services & Grantmaking.

The Community Foundation leads, inspires and encourages all individuals and organizations to create or contribute to lasting philanthropic charitable legacies, using the power of collective philanthropy to improve the quality of life primarily in Chester County.

WE THANK YOU IN ADVANCE
FOR PLANNING AHEAD.

For Good. For Ever.

Chester County
COMMUNITY FOUNDATION

28 WEST MARKET STREET | WEST CHESTER, PA 19382
PHONE: (610)696-8211 | FAX: (610)696-8213
www.chescocf.org | info@chescocf.org

A copy of the official registration and financial information for the Chester County Community Foundation may be obtained by calling the PA Department of State at 1-800-732-0999 (toll free in PA). Registration does not imply endorsement.

JOIN THE
Ben Franklin
Legacy Society

OF THE
Chester County
COMMUNITY FOUNDATION

For Good. For Ever.

Let your legacy make a difference

IN CHESTER COUNTY

The Ben Franklin Legacy Society recognizes all those who have notified the Chester County Community Foundation that they have included any fund of the Community Foundation in their will or other deferred giving plan.

WHY JOIN THE LEGACY SOCIETY?

Generous individuals who have achieved success during their lifetimes frequently wish to give back to the community where they were raised, nurtured and prospered.

Some people also realize that by making their charitable intentions public, they, in turn, inspire others to become more involved with their communities.

Being a member of the Ben Franklin Legacy Society is a way to show your family, friends and colleagues that you intend to take care of the community causes that matter most to you, forever.

By joining our Ben Franklin Legacy Society you make your intentions public and help inspire others to consider the same. This helps to build a strong, vibrant philanthropic community.

The Society derives its name from the Benjamin Franklin Trust which Ben himself set up in the 1790's, to be distributed 200 years after his death. Two centuries later in 1996, Chester County Community Foundation's first planned gift was a portion of this original trust.

Chester County
COMMUNITY FOUNDATION

Join our Ben Franklin Legacy Society, and benefit Chester County forever.

Here's how to join the Ben Franklin Legacy Society - just two steps:

1. Arrange your estate to leave a gift to any fund at the Community Foundation.

Common ways to do this are:

- a. Bequest through your will or trust
- b. IRA/401K designation
- c. Life Insurance policy beneficiary designation
- d. Charitable Trusts (life income arrangements)

Charitable Remainder Trust

Charitable Lead Trust

Charitable Gift Annuity

- e. Deferred Fund Agreement (available from the Community Foundation office)

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

2. Inform the Chester County Community Foundation that you have made the necessary arrangements. By notifying us in writing, such as by returning this form, you give us permission to include your name in future listings of Ben Franklin Legacy Society members. This helps inspire others

KEY POINTS ABOUT THE *Ben Franklin Legacy Society*

1. The Ben Franklin Legacy Society is a list of those who have named the Chester County Community Foundation as the beneficiary of any type of planned or deferred gift, and who choose to be listed. **The purpose is to develop supporters whose participation will encourage others to do the same.**
2. **Ben Franklin Legacy Society membership is self-reported.** We know many who have included the Chester County Community Foundation in their estate plans, but who choose to remain anonymous. Thus, they are not named as members of the Society.
3. **Joining the Ben Franklin Legacy Society requires two steps.** First, arrange for a planned gift to any fund of the Foundation. Second, inform the Foundation.
4. **There is no minimum amount** needed to be left to the Foundation to qualify; only that you have made the necessary arrangements and are willing to be listed. To date we have received bequests, or know of future bequests or other types of planned gifts, ranging from \$10,000 to \$2,500,000. The range is wide, as befits a community foundation.
5. **Ben Franklin Legacy Society members may designate the use** of the distributions from their future gifts, or may leave the distributions to the discretion of the Grants Committee. A Ben Franklin Legacy Society gift may be used to establish a new Named Fund (if it is over \$10,000) or may be added to any of the Community Foundation's existing funds.
6. **We do not ask the size of the planned gift.** We encourage donors to discuss their gifts with us to make sure we can comply with their wishes, but this is not mandatory.
7. **Bequests are the most common method used to leave a gift.** However, we also know of people who have made the Foundation the beneficiary of 401K/IRA plans, insurance policies, established a charitable trust in favor of the Foundation, and/or used other methods. All can qualify a person or couple for membership in the Society.