



Legacy Society

* Confidential Membership Acceptance Form *

Federal Tax ID (EIN): 27-0660682

Phone Number: 859-448-8984

I/We wish to be recognized with membership into the Legacy Society to ensure the continued growth of the World Affairs Council – Cincinnati & Northern Kentucky.

NAME _____

TELEPHONE _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

NOTE: Legacy Society membership does not require disclosure of the information asked below. However, we ask for this information in order to document and steward your gift, as well as to offer counsel if appropriate. All information is considered confidential.

I/We have provided for the future of the World Affairs Council in the following manner:

- ☐ Bequest through Will or Trust
- ☐ Gift of life Insurance
- ☐ Charitable Gift Annuity
- ☐ Bequest of retirement plan assets
- ☐ Charitable Remainder Trust
- ☐ Remainder interest in residence or farm
- ☐ Charitable Lead Trust
- ☐ Other: _____

Attached please find a copy of the page or paragraph from the will or trust bequest, beneficiary designation form for life insurance, or retirement plan that describes my gift provision.

The estimated current dollar value of my gift is \$_____.

Note: A dollar value of your planned gift will be credited to you for cumulative gift recognition. My gift is to be used as follows:

Please list my name (and/or my spouse's name) for Legacy Society in the following manner:

- ☐ Yes - You have my/our permission to include my/our name(s) in published lists (publications, newsletters, donor recognition plaque, and website) recognizing Legacy Society members.
- ☐ Yes - You have my/our permission to count the dollar value of my/our planned gift toward my/our cumulative lifetime giving.
- ☐ No - I understand these societies offer additional recognition (newsletters, donor recognition plaque, and website), but please don't recognize me in this way.

This intent form is non-binding and serves solely to assist the World Affairs Council in future planning and donor recognition.

Signature

Full Name Printed

Date

Email Address

Signature

Full Name Printed

Date

Email Address

Please return your completed form to:

World Affairs Council – Cincinnati & Northern Kentucky

Mail: 5300 Campus Drive MP 474, Highland Heights, KY 41099

Email Michelle Glandorf, President & CEO: mharpenau@cincyworldaffairs.org

Questions? Call us at 859-448-8984