



**M E Q U O N  
T H I E N S V I L L E**  
COMMUNITY FOUNDATION

## Mequon-Thiensville Community Foundation Legacy Club

I/We want to join the MTCF Legacy Club and understand that membership means making a gift now, over a multiple time frame, or in the future valued at a minimum of \$10,000.

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

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_

My/Our total gift to Mequon-Thiensville Community Foundation Legacy Club will be \$ \_\_\_\_\_

I would like the gift designated to:

\$ \_\_\_\_\_ specific project \_\_\_\_\_ (name of project)

\$ \_\_\_\_\_ wherever needed most as determined by the Mequon-Thiensville Community Foundation Board

\$ \_\_\_\_\_ endowment fund

My Gift consists of:

- Cash donation of \$ \_\_\_\_\_ to be paid:
  - In full (check enclosed or being mailed)  In installments of \$ \_\_\_\_\_ over # \_\_\_\_\_ mos qtrs yrs  
(PLEASE CIRCLE ONE)
- In-kind appreciated stock transfer. Call 262-238-3803 for details and to arrange.
- I/We have made the following provision for a deferred gift estimate value of \$ \_\_\_\_\_ (optional)
  - Bequest / Will / Revocable Trust  IRA or other Retirement Plan beneficiary designation
  - Life Insurance beneficiary designation  Charitable Remainder Trust
  - Pooled Income Fund  Charitable Gift Annuity
  - Other: \_\_\_\_\_

A copy of the legal document that establishes this deferred gift:

- Is enclosed
- Will be provided to the Mequon-Thiensville Community Foundation at a later date
- Will not be provided

As a member(s) of the Legacy Club:

- I/We authorize the Foundation to list me/us as members of the Legacy Club in Foundation publications and on the MTCF Website.
- My/Our name(s) should appear as: \_\_\_\_\_
- I/We prefer confidentiality and do not wish my/our names to be published, but would appreciate receiving on-going information and invitations for Foundation events.

\_\_\_\_\_  
Signature (This Statement of Intent is non-binding)

\_\_\_\_\_  
Date



## Mequon-Thiensville Community Foundation Legacy Club

Our Legacy Club is a group of passionate individuals who share a commitment to support and sustain the many programs and projects that enhance the quality of life in the Mequon and Thiensville communities. Membership means making a gift now or in the future, which can be designated to a specific project or the Foundation can determine where it is needed most.

Membership in Mequon-Thiensville Community Foundation's Legacy Club is open to anyone who makes a gift now or in the future of \$10,000 or more. That commitment can be made a variety of ways:

**An Outright Gift** — cash or appreciated securities at a level of \$10,000 or greater.

**Gifts of Life Insurance** — naming Mequon-Thiensville Community Foundation as an owner or beneficiary of a policy.

**Testamentary Gifts** — a will or bequest designating a specific amount, assets, or percentage of the donor's estate.

**Trusts** — a form of a charitable trust can be established that will provide the donor with income and/or tax advantage.

Through these generous contributions, the Mequon-Thiensville Community Foundation can make a difference in your community. Members will be perpetually listed on our Legacy Club page on our website and will receive recognition in other ways throughout the year.

If you want to join this club, please complete the Legacy Club membership form or email to [info@mtcfives.org](mailto:info@mtcfives.org) or mail to: Mequon-Thiensville Community Foundation, P.O. Box 52, Mequon, WI 53092. For more information on becoming a Legacy Club Member, leave a message with the Mequon-Thiensville Community Foundation at 262-238-3803.