

Central Susquehanna Community Foundation

309 Vine Street • Berwick • PA 18603 • 570-752-3930 • Fax 570-752-7435

Joining The Legacy Society

Our Legacy Society honors those who have included a gift to the Community Foundation in their estate plan and have informed the Foundation of their commitment. The gift can create a new fund to benefit area non-profit organizations (one or more), or it can be added to an existing fund such as the Berwick Health and Wellness Fund.

Here's how to join the Legacy Society – just two steps:

1. Arrange your estate to leave a gift to CSCF. Common ways to do this are:
 - a. Bequest through your will or trust
 - b. IRS/401K designation
 - c. Life Insurance policy beneficiary designation
 - d. Charitable Trusts (life income arrangements)
 - i. Charitable Remainder Trust
 - ii. Charitable Lead Trust
 - iii. Charitable Gift Annuity
 - e. Estate Note/Deferred Pledge Agreement (available from CSCF office)

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

2. Inform the Central Susquehanna Community Foundation that you have made the necessary arrangements by returning the form below. This will give us permission to include your name in future listings of the Legacy Society members.

CENTRAL SUSQUEHANNA COMMUNITY FOUNDATION
309 Vine Street, Berwick, PA 18603 – 570-752-3930 – fax 570-752-7435

The Legacy Society

I/We have made a provision for the Central Susquehanna Community Foundation in my/our estate plans and wish to be included in the Legacy Society. I/We agree to be included in published listings of the Legacy Society's members.

Please print name(s) as you wish to be listed

Signature

Date

The official registration and financial information of the Central Susquehanna Community Foundation may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

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Key Points about The Legacy Society

1. The Legacy Society is a list of those who have named the Central Susquehanna Community Foundation (and through us, other non-profit organizations or the Berwick Health and Wellness Fund) as the beneficiary of any type of planned or deferred gift... and who choose to be listed. The purpose is to develop a large list that will encourage others to do the same.
2. The Legacy Society membership is self-reported. We know of others who have included the Central Susquehanna Community Foundation in their estate plans, but who choose to remain anonymous. Thus, they cannot be members of the Society.
3. Joining The Legacy Society requires two steps. First, arrange for a planned gift in favor of the Foundation. Second, inform the Foundation by submitting The Legacy Society form. The Legacy Society forms are available through the Foundation office.
4. There is no minimum amount needed to be left to CSCF to qualify. Only that you have made the necessary arrangements and are willing to be listed.
5. ♦ The Legacy Society members may designate the use of the distributions from their future gifts, or may leave the distributions to the discretion of CSCF's Grants Committee. A Legacy Society gift may be used to establish a new Named Fund (if the size requirements are met) or may be added to any of the Foundation's existing funds. ♦
6. We do not ask how much is being left to the Foundation. 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 methods used to leave a gift to CSCF. However, you may also make the Foundation the beneficiary of 401K/IRA plans, insurance policies, establish a charitable trust in favor of the Foundation, sign a deferred pledge and /or use other methods. All can qualify a person or couple for membership in the Society.
8. We will list The Legacy Society members in publications such as our Annual Report, newsletter, ads in newspapers and event programs.
9. We will hold a special reception just for The Legacy Society members each year and invite Society members to all other Foundation events.
10. Gifts supporting the Central Susquehanna Community Foundation will ensure our ability to create a better future for all of us.