

The Legacy society of the Bartlesville Community Foundation recognizes individuals and families who have made provision for a gift to the Foundation in their estate plan. Membership is by written confirmation of your deferred gift arrangements. Thank you for allowing the Bartlesville Community Foundation (BCF) to assist you in carrying out your philanthropic goals.

**CURRENT GIFT****I. LEGACY SOCIETY ELECTIONS**

- \_\_\_\_\_ Start a permanent BCF component fund named:  
\_\_\_\_\_

OR

- \_\_\_\_\_ Give to an existing BCF component Fund

AND

- We plan to give at least \$25,0000:
  - \_\_\_\_\_ once, now.
  - \_\_\_\_\_ over the next 12 months
  - \_\_\_\_\_ over the next 24 months
  - \_\_\_\_\_ over the next 36 months

**FUTURE GIFT****I. I HAVE INCLUDED THE BCF IN MY ESTATE PLAN BY INCLUDING IT IN MY:**

- \_\_\_\_\_ Will or Revocable Trust
- \_\_\_\_\_ Life Insurance Policy
- \_\_\_\_\_ Charitable Trust
- \_\_\_\_\_ Qualified Charitable Distribution (Retirement Plan)
- \_\_\_\_\_ Other: \_\_\_\_\_

**II. ALLOCATION:**

- The gift will be allocated:
  - \_\_\_\_\_ To an existing fund. (Please complete item "a" below)
  - \_\_\_\_\_ To establish a fund. (Please complete item "b" below)
  - \_\_\_\_\_ To BCF's Endowment
  - \_\_\_\_\_ To BCF's Community Fund "Fund for Bartlesville"
- a. If this gift is to be added to an existing fund at the BCF as governed by all related agreements, please provide the name of the fund to which you have designated your planned gift: \_\_\_\_\_

- b. If this gift will be used to establish a new fund at the BCF, please suggest a fund name and purpose below.

i. Fund Name: \_\_\_\_\_

ii. Purpose: \_\_\_\_\_

### **III. LEGACY SOCIETY MEMBER**

\_\_\_\_\_ I/we would like to be recognized and included in the BCF's Legacy Society.  
Please recognize the fund or my/our name(s) as listed:

\_\_\_\_\_

\_\_\_\_\_ I/we **do not** wish to be recognized or included in the BCF's Legacy Society

\_\_\_\_\_ I/we wish to **remain anonymous until** the BCF receives our legacy bequest.  
At that point I/we would like to be recognized as our fund name or my/our name(s)  
as listed: \_\_\_\_\_

\_\_\_\_\_ I/we wish to remain anonymous forever.

### **IV. ALTERNATIVE/ADDITIONAL DIRECTIONS**

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A statement of your intent to leave a gift to the BCF through your estate plan is all you need to become a Legacy Society member. BCF will work with you to document specific ways you would like to be remembered through your gift and how you would like to be recognized. Your gift can be used to establish a new fund that reflects your charitable interests, or you can add it to any of the BCF's existing funds.

We will work with you to create a giving plan that fulfills your charitable vision. You can change your distribution instructions, grantees, and percentages at any time without the need to revise your estate plan.

#### **Sample Language to include a planned gift as part of your will:**

I/we bequeath to Bartlesville Community Foundation (tax ID # 73-1575838) located at 321 SE Delaware, Bartlesville, OK 74003 \_\_\_\_\_ % of my residual estate – OR- the sum of \$\_\_\_\_\_ to be used for charitable purposes set forth in a Statement of Intent or Letter of Understanding held by Bartlesville Community Foundation.

**Please return completed and signed form to:**

Bartlesville Community Foundation  
321 SE Delaware  
Bartlesville, OK 74003

**Nonbinding Statement of Intent**

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Donor 1 Name

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Donor 2 Name

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Donor 1 Signature

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Donor 2 Signature

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Donor 1 Address

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Donor 2 Address

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Donor 1 Phone

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Donor 2 Phone

BCF Representative Name and Signature: \_\_\_\_\_