

# STATEMENT OF DONOR INTENT

**The Legacy Society** of Eau Claire Public Schools 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 Eau Claire Public Schools Foundation (ECPSF) to assist you in carrying out your philanthropic goals to benefit education.

I HAVE INCLUDED ECPSF IN MY ESTATE PLAN BY INCLUDING IT IN MY:

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

- The gift will be allocated:
- (\$ or %) \_\_\_\_\_ to an existing or to establish a Fund
- (\$ or %) \_\_\_\_\_ to ECPSF's Districtwide Fund for the Future, unrestricted for ECASD schools
- (\$ or %) \_\_\_\_\_ to ECPSF's Operations Fund to support ECPSF's work

- The gift should be added to an existing Fund at ECPSF as governed by all related agreements:
- Name of Fund: \_\_\_\_\_

- The gift will be used to establish a new Fund at ECPSF:
- New Fund Name: \_\_\_\_\_
- Purpose: \_\_\_\_\_

## Legacy Society Member

- I am undecided, but interested, call or email me regarding the Legacy Society
- I accept your invitation to become a Legacy Society Member and give you permission to use the name(s) listed ECPSF publications
- Name as it will appear in publications: \_\_\_\_\_
- The membership will remain anonymous until ECPSF receives our legacy bequest
- The membership will remain anonymous, forever

Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

City/State/ZIP: \_\_\_\_\_ Email: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



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Alternative/Additional Directions

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

I/we bequeath to Eau Claire Public Schools Foundation (tax ID: 26-1877961) located at 500 Main St. Eau Claire, WI 54701 \_\_\_\_% of my residual estate – OR – the sum of \$\_\_\_\_ to be used for charitable purposes set forth in a Statement of Intent or a Letter of Understanding held by Eau Claire Public Schools Foundation.

Please return completed and signed form to:

Eau Claire Public Schools Foundation  
500 Main St.  
Eau Claire, WI, 54701

Or email to [sarahfrench@ecpsfound.org](mailto:sarahfrench@ecpsfound.org)

**Statement of Intent is nonbinding**

