



As an organization committed to the past, present and future of Washtenaw County, we honor the legacies of those before us. We also want to be sure we honor your intentions for your legacy. By documenting your estate plans with AAACF, we are able to plan appropriately and ensure the careful stewardship of your legacy in our community.

We complete separate fund agreement forms when appropriate to properly document your intentions and would be happy to discuss this with you. This process is especially valuable when you have a specific name for a future fund or a particular cause or organization you want to support.

Thank you for completing and returning this form. Please let us know whether you agree to be listed as part of our Stern Legacy Society:

YES, please list me/us as members of AAACF's Stern Legacy Society for this commitment.

NO, please keep my/our commitment anonymous and do not list me/us as Society members.

Full name Dr. Mr. Mrs. Ms.

Nickname/preferred name

Spouse/partner name Dr. Mr. Mrs. Ms.

Spouse/partner nickname/preferred name

Address

Seasonal address

Please note dates for seasonal address

Email

Spouse/partner email

Phone (primary)

Phone (other)

Preferred method of contact Mail Phone Email Personal visit

Professional advisor(s) who helped with your estate plans

YES! I/we have included AAACF in my/our estate plans.

Bequest in will

Life Insurance Beneficiary

Other: _____

Charitable Remainder Trust

Retirement Plan Beneficiary _____

My/our intentions are for a specific purpose.

Please share more detail around your intentions to help ensure that we carry out your legacy:

In addition to the Stern Legacy Society, we also have a Stern Match. Through the generosity of Helmut Stern, we are encouraging others to follow his example in making an estate gift for the future of Washtenaw County through the **Stern Legacy for Community Impact Match.**

When you document a planned or legacy gift with the Community Foundation—whether it's ideally unrestricted for broad community impact or for a fund dedicated to a cause or to a specific nonprofit—we will provide a current 50% match of that projected gift value up to \$50,000 per donor. The current match will support AAACF's community impact work—starting now, and forever. For estate gifts of at least \$10,000, this match creates a named Community Impact fund in your name, or that of someone you wish to honor.

To qualify for the Stern Legacy Challenge Match, estate gifts must be documented with AAACF and also provide an estimated gift value to determine the amount of the Community Impact fund.

Documentation of my/our legacy gift is attached.
(Example: beneficiary designation page of retirement plan naming AAACF.)

The projected value of my/our legacy gift: \$ _____

If my/our estate plans qualify, I/we would like the Community Impact Fund to be named:
