



The Legacy Circle recognizes a special group of donors who have made a provision in their estate plans to benefit their favorite charitable cause(s) through Rusk County Community Foundation. Membership is by written confirmation of your deferred gift arrangements. Thank you for allowing the Rusk County Community Foundation (RCCF) to assist you in carrying out your philanthropic goals.

**I have included the Foundation in my estate plan by including it in my:**

- Will or Revocable Trust
- Life Insurance Policy
- Other: \_\_\_\_\_
- Charitable Trust
- Qualified Charitable Distribution (Retirement Plans)
- The gift will be allocated:
  - (\$ or %) \_\_\_\_\_ to an existing or to establish a Fund
  - (\$ or %) \_\_\_\_\_ to RCCF's Community Grants Fund, unrestricted for Rusk County
  - (\$ or %) \_\_\_\_\_ to RCCF's Operations Fund to support RCCF's community work

The gift is to be added to an existing fund at RCCF as governed by all related agreements:  
Name of Fund: \_\_\_\_\_

The gift will be used to establish a new fund at RCCF:  
Name of Fund: \_\_\_\_\_  
Purpose: \_\_\_\_\_

**Legacy Circle Member**

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

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Name: \_\_\_\_\_ Email: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Name: \_\_\_\_\_ Email: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Address: \_\_\_\_\_ Phone: \_\_\_\_\_  
 City/State/ZIP: \_\_\_\_\_ Phone: \_\_\_\_\_



## Alternative/Additional Directions

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A statement of your intent to leave a gift to the Foundation through your will or estate plan is all you need to become a member of the Legacy Circle. The Foundation 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 Foundation’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 will.

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

I/we bequeath to Rusk County Community Foundation, a regional affiliate fund of the Eau Claire Community Foundation, (tax ID# 1891064) located at PO Box 54, Ladysmith, WI 54848 a \_\_\_\_\_ % 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 Rusk County Community Foundation, a regional affiliate fund of the Eau Claire Community Foundation.

Please return completed and signed form to:

RCCF  
PO Box 54  
Ladysmith, WI 54848

Contact us: [info@rccfwi.org](mailto:info@rccfwi.org) or 715.210.4446

## Nonbinding Statement of Intent

\_\_\_\_\_  
Chair, RCCF Advisory Board

Accepted as of \_\_\_\_\_, 20 \_\_\_\_

Approved by ECCF Board of Trustees: \_\_\_\_\_, 20 \_\_\_\_

Revisions approved 1/6/2023