

# NORTH TEXAS COMMUNITY FOUNDATION

## Legacy Society

### THE FOUNDATION FOR THE FUTURE

Imagine a brighter future for the causes and organizations you care about most. With thoughtful estate planning now, you can be assured your assets will support our community beyond your lifetime.

### CHARITABLE DOLLARS USED THE WAY YOU INTENDED

The Legacy Society honors the generous donors who have entrusted North Texas Community Foundation to carry out their charitable intentions.



### HOW IT WORKS

- You include NTCF as a beneficiary of your will or trust to benefit the charitable cause(s) of your choice.
- You determine the type of fund you would like to establish:
  - › **Donor Advised:** Keep future generations involved in grantmaking.
  - › **Designated:** Provide sustained revenue for your church or favorite nonprofit.
  - › **Field of Interest:** Impact specific causes close to your heart.
  - › **Unrestricted:** Respond to emerging needs in North Texas.
- Your charitable gift is excluded from your assets for estate tax purposes.
- Your gift creates a legacy of your values, helping to do good work in North Texas and beyond.



*I have been blessed to carry on my family's legacy through the Community Foundation and trust that their team will continue our legacy for years to come.*

*- Marty Leonard*





## BENEFITS

### During Your Lifetime

- › **Guidance:** Our team will help you craft a legacy giving plan that honors your charitable intention.
- › **Community:** The Legacy Society gives you the opportunity to connect with a group of like-minded donors committed to the future of our region.
- › **Flexibility:** Execute a fund agreement that outlines your wishes—which may be amended any time without additional cost or legal assistance.
- › **Events:** Receive invitations to the Community Foundation’s signature events.
- › **Preservation:** NTCF will share your story and photographs with future generations that will benefit from your generosity.
- › **Inspiration:** We’ll keep you up to date on NTCF news, community needs, family philanthropy tips and stories of impact.
- › **Recognition:** Receive acknowledgement in NTCF materials—or you may choose to remain anonymous.

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### ... And Beyond

- › **Sustainability:** A legacy gift provides continued support for the community you love.
- › **Customized Grant Cycle:** Funds over \$5 million are eligible for a customized, responsive grant cycle administered by the NTCF grant committee.
- › **Dependability:** NTCF will fulfill your charitable intent today, tomorrow and beyond your lifetime.
- › **Oversight:** NTCF’s board will ensure your grants are used for the intended purpose, for the timeframe you determine.
- › **Growth:** NTCF works to grow assets over time through prudent stewardship.
- › **Impact:** Unrestricted gifts will be bolstered by other funds to amplify their impact in our community.

**We will work alongside your estate planning team to maximize the impact of your gift to shape the future of North Texas for good, forever.**

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For more information on planned giving or the Legacy Society, please contact the Community Foundation at 817.877.0702

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