

## *A Gift from your Estate will Change Lives*

**If you name the Community Foundation or a named fund in your will, you will automatically be recognized as a member of the Greenleaf Legacy Society and distinguish yourself as someone who has made a conscious decision to leave a lasting legacy in your community.**

Named for Oscar Benton Greenleaf, the **Greenleaf Legacy Society** is a group of visionary people who have named the Foundation in their estate plans, either by will designation or through a trust or other deferred gift. These planned gifts are of inestimable importance to the future of our region. Planned giving offers many personal, financial and tax benefits to you, your family and your heirs. We can provide you with more information about bequests, charitable trusts that can provide income to you now and create a fund later on, how to use a life insurance policy to create a charitable fund, and other ideas.

### *Members of the Greenleaf Legacy Society*

<i>Anonymous #1</i> <i>Anonymous #2</i> <i>Joseph Amato</i> <i>Rhett Austell</i> <i>Ann Barber Smith</i> <i>Lillian J. Bauer (estate of)</i> <i>Katie Bonelli</i> <i>William J. Jr., and Mary Bratton</i> <i>David Cocks</i> <i>Denise &amp; Gregory Coen</i> <i>William Devitt</i> <i>Ron &amp; Anita Feller</i> <i>Mark Fenton</i> <i>Deborah Wilkins-Flippin</i> <i>Katharine F. Fitzgerald</i> <i>Nicholas Gerten</i>	<i>Roger Gibboni</i> <i>Patricia Gilchrest</i> <i>Oscar B. Greenleaf (estate of)</i> <i>Joanne Gross</i> <i>Kenneth I. Gumaer, Sr., DVM</i> <i>Mr. &amp; Mrs. Christian M. Hammaren</i> <i>David L. Hawkins</i> <i>Bud &amp; Ruth Kassel</i> <i>Ronald E. &amp; Ericka U. Leaf</i> <i>Nicole &amp; Robert Lee</i> <i>Sandy Leonard</i> <i>Harold Levine (estate of)</i> <i>Jonah Mandelbaum</i> <i>Dr. Douglas M. McBride &amp; Nancy McBride</i> <i>Renee McCabe</i> <i>Frances Melder</i>	<i>Anne Palmer Moss</i> <i>Edward &amp; Floranne Moulton</i> <i>Robert Onofry</i> <i>James H. Ottaway, Jr.</i> <i>Gordon Rauer</i> <i>Willard &amp; Norma Schadt</i> <i>Ruthe Silberman (estate of)</i> <i>Graham Skea</i> <i>RJ &amp; Elizabeth Smith</i> <i>Mary J. Sullivan</i> <i>William Vacca</i> <i>Karen VanHouten</i> <i>Mary Williamson</i> <i>Derrik Wynkoop</i>
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### *How do I become a Member of the Greenleaf Legacy Society?*

1. Plan your estate to establish a new fund, contribute to an existing fund, or to directly support the work of the Community Foundation.
2. **Inform the Community Foundation that you have made the necessary arrangements by returning the form below.**
3. Your name will then be added to the distinguished list of **Greenleaf Legacy Society** Members.

*I have made a provision in my estate plan for the Community Foundation of Orange County, Inc. d/b/a Community Foundation of Sullivan County and wish to become a member of the Greenleaf Legacy Society.*

## *Including the Foundation in Your Will*

Some donors choose to establish a fund during their lifetime so they can benefit from actively participating in their grant making. Other donors establish a fund through a “bequest” to the Community Foundation, or through other methods of “deferred” giving. Please call Karen VanHouten Minogue at 769-9393 to learn more about how to create a fund with a gift of life insurance, a life estate, or through a charitable trust.

<p><b>In order to include a charitable bequest in your will, your legal counsel may use language similar to this:</b></p>
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***I give, devise and bequeath the following:***

*(Describe assets that are the subject of the bequest; for example, a stated sum or the residue of the estate, or a percentage of the residue of the estate.)*

***To the Community Foundation of Orange County, Inc. (d/b/a Community Foundation of Sullivan County), a nonprofit corporation within the State of New York.***

***This gift shall be known as the \_\_\_\_\_ Fund.*** (Name chosen by you.)

If you desire that the bequest be applied to an area of charitable interest or to a specific organization, please add the following language:

***This fund shall be devoted to the support of: \_\_\_\_\_***

If you desire that the bequest be applied to an existing fund, please add the following language:

***This charitable bequest shall be added to the \_\_\_\_\_ Fund.***

*I/We would like to become a Member of the Greenleaf Legacy Society*

\_\_\_\_\_ I/We agree to have my/our names(s) included in the listing of Society members in the publications and on the website of the Community Foundation. Name(s) as you wish to be listed:

\_\_\_\_\_

\_\_\_\_\_ I/We prefer to remain anonymous in the publications and on the website of the Community Foundation.

\_\_\_\_\_ (signature)

**Contact Information:**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Date: \_\_\_\_\_

***Please mail to:*** Community Foundation of Orange and Sullivan, 30 Scott's Corners Dr.,  
Suite 202, Montgomery, NY 12549  
(T) 845-769-9393 (F) 845-769-9391