



Rusk County
Community Foundation

P.O. Box 54 Ladysmith, WI 54848

Phone 715-532-0772

Fax 715-532-4780

www.ruskfoundation.org

The Legacy Circle

The Legacy Circle recognizes a special group of donors who have made a provision in their estate plans to benefit their favorite charitable cause through Rusk County Community Foundation.

Including a charitable bequest in your will is a simple way to make a lasting gift to benefit the Rusk County region. Our staff can provide you and your advisor simple language to include in your will or other planned giving vehicles. Your future gift can be made in the form of cash, stock, or property, whether specific or by percentage; a gift of real estate, a gift in trust to benefit family members during their lives, or a gift of the remainder of an estate when other specific bequests have been fulfilled.

A **bequest** is a way that is:

- **Flexible.** You can change your mind at any time.
- **Economical.** Your charitable gift is excluded from your assets for estate tax purposes.
- **Personal.** Your gift can be placed into any of our existing endowment funds or you can create a fund for your specific charitable purpose.
- **Permanent.** Your gift – and all future earnings from your gift – is a permanent source of community capital, helping to do good work forever.

Joining The Legacy Circle helps to ensure that future generations will continue to enjoy a vital and caring community. It's simple and flexible. There is no minimum or maximum gift. While we hope Legacy Circle members will allow us to list their names, you may choose to remain anonymous. You do not need to share the amount of your gift. Although if you wish to create a fund for a specific purpose, a confidential conversation with our staff can ensure your intentions will be met.

How to get started.

- **Discuss** your estate plan with your financial or legal advisor.
- **Contact** the Rusk County Community Foundation office at 532-0772 for sample language to include in your will, trust or other deferred gifts.
- **Notify** us when your estate plan is complete and we will send you a Legacy Circle Welcome Form.

Members of The Legacy Circle will be invited to our annual Heart of Gold Banquet, receive our newsletter and be given notice of other special events. Thank you for leaving your personal and permanent legacy of care and concern for your favorite cause in Rusk County!

“Bringing Together People Who Care With Causes That Matter”

Rusk County Community Foundation

Serving Rusk County Since 2007

“Bringing Together People Who Care With Causes That Matter”

The Legacy Circle

Welcome to The Legacy Circle! We are grateful for your commitment to enhance the quality of life in Rusk County. In order to properly recognize your future gift we ask that you complete and return this form. **THANK YOU!**

I/We _____ (please print)
have included the Rusk County Community Foundation in our estate plans.

___ Yes, you may list my/our names, printed above, as members of The Legacy Circle.

___ No, I/we wish to remain anonymous at this time.

Signature Date

Signature Date

Confidential

Optional Information – Not Required but helpful for planning

___ I / We have directed the RCCF Board to use our gift where it is needed most.

I/We have directed our gift to be added to the existing _____ Fund.

And / Or wish to establish a new fund to benefit the following organization/s:

_____.

And / Or we would like to create a fund to benefit the following specific area of interest:

_____.

The estimated total of our future gift is: _____.

Please return to: Rusk County Community Foundation, P.O. Box. 54, Ladysmith, Wi. 54848
Questions? Call 532-0772