

DONOR SERVICES

Planned Giving & The Legacy Society



The Legacy Society is comprised of donors who have made a planned gift to the Community Foundation of the Ozarks or one of its affiliates. Created in 1990 to recognize and thank donors in their lifetimes for their lasting commitment to philanthropy, the Legacy Society is an opportunity for donors to build a lasting relationship with the CFO.

According to the Missouri Alliance of Community Foundations, over the next 10 years, citizens of the Ozarks who are members of the “greatest generation” and the first wave of the baby boomers that followed will transfer an estimated \$47.2 billion of accumulated wealth to their heirs and others. Over 50 years, that amount increases to a staggering \$565 billion. If a small portion of those dollars—even a mere five percent—are left charitably, those gifts can positively impact our communities in perpetuity.

The intent of the Legacy Society is to underscore the value of creating a will or estate plan that not only protects your assets for you and your family, but ensures your support for your favorite charitable causes and interests—our hometowns and communities, our young people and alma maters, our less fortunate, our faiths, our environmental, artistic and historic resources—forever.

With recognition and appreciation for their planned gifts, the CFO truly believes Legacy Society members provide valuable leadership that may inspire others to make a similar charitable commitment through the CFO or one of its affiliate foundations.

Leaving a Planned Gift

- Planned gifts can be directed to any charitable or nonprofit organization and can be of any size—anyone can leave a legacy.
- Gifts can range from a simple bequest in your will to life-estate planning that can include tax benefits for you and your heirs. While the CFO and its affiliate foundations offer a variety of charitable fund options, donors are encouraged to review estate plans with an attorney or financial advisor.
- Making a planned gift is simple and confidential. If you choose, your gift will not be revealed until your will or estate is executed.
- Your gift will be managed, invested and administered through the CFO, which has a proven record of serving central and southern Missouri since 1973.
- An endowed gift—meaning the principal remains intact while a certain percentage is distributed each year—can make a difference forever for a charitable organization, a church or scholarships for individuals.
- Legacy Society members are recognized in the CFO’s annual report, invited to special events, and kept informed about our activities.

For more information about joining the Legacy Society, contact **Caitlin Golike**, Director of Donor Services, at cgolike@cfozarks.org or (417) 864-6199.



COMMUNITY FOUNDATION *of the* OZARKS