

Notifying the Community Foundation of your Client's Charitable Plans



If your client has named the Community Foundation in their will or estate plan we hope you will let us know.

The Community Foundation of Snohomish County will respect the wishes of donors who want to remain anonymous as well as those who do not want to be contacted. However, we encourage all donors to let us know how they would like their gift used. Whenever possible, we also like to thank donors for the generosity of these future gifts. If your client does not wish to make details known, simply knowing about their gift allows us to project future support for the many important charitable causes in our community.

My client has designated a future gift be made through their estate to:

- The Community Foundation of Snohomish County
- The following fund held at Community Foundation of Snohomish County:

- My client would like to remain anonymous.**
- My client would like his/her/their name listed as a member of the Community Foundation's legacy society, but does not wish to be contacted.**

Optional:

Client/Donor Name(s) _____

Mailing Address _____

City/State/Zip _____

My client's future gift will be in the form of:

- Bequest in their will
- Beneficiary Designation in a Life Insurance Policy
- IRA or other retirement account
- Other _____

Estimated amount of future gift (optional): \$ _____

Additional Information about you, their Professional Advisor (optional):

Name _____

Firm _____

Email _____

Phone _____

Postal Address _____