



Date \_\_\_\_\_

Wenatchee Rotary Foundation  
**Legacy Society Membership Form**

Name(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_ Alternate Phone \_\_\_\_\_

Birth date (optional) \_\_\_\_\_ Email \_\_\_\_\_

*I have made or intend to make a legacy gift to the "Wenatchee Rotary Foundation" (WRF) as indicated below.*

- Will (Please designate: **Wenatchee Rotary Foundation**)
- Life Insurance Policy or Retirement Plan Beneficiary Designation
- Trust in which Wenatchee Rotary Foundation is named beneficiary.  
Please indicate when the Foundation's interest will take affect.  
(Example: "Income to my spouse, then principal to Wenatchee Rotary Foundation")
- Deferred Gift (i.e. Charitable Gift Annuity, Pooled Income Fund, Charitable Remainder Trust, Charitable Lead Trust, etc.) Please contact the WRF President to discuss.
- Traditional IRA (tax free) Mandatory Required Distribution (RMD) as a qualified charitable distribution (QCD)
- Other (description) \_\_\_\_\_
- I want my bequest to go to the WRF Endowment Fund (Restricted)
- I want my bequest to go to the WRF Operating Fund (Unrestricted)

Estimated amount of gift: \$ \_\_\_\_\_ or \_\_\_\_\_ % of estate, policy or account.

**Optional:** Please enclose a copy of the pertinent section of your document mentioning Wenatchee Rotary Foundation as a beneficiary. We will retain this in our confidential files as a record of your intention.

Congratulations! Your gift qualifies you for membership in our Legacy Society. We are honored to recognize you in our Legacy Society material unless you indicate otherwise.

Please list my/our names as follows: \_\_\_\_\_

Signature(s): \_\_\_\_\_

**Please email or mail the completed form to:**  
WenatcheeRotaryFoundation@gmail.com • P.O. Box 173, Wenatchee WA 98807-1723