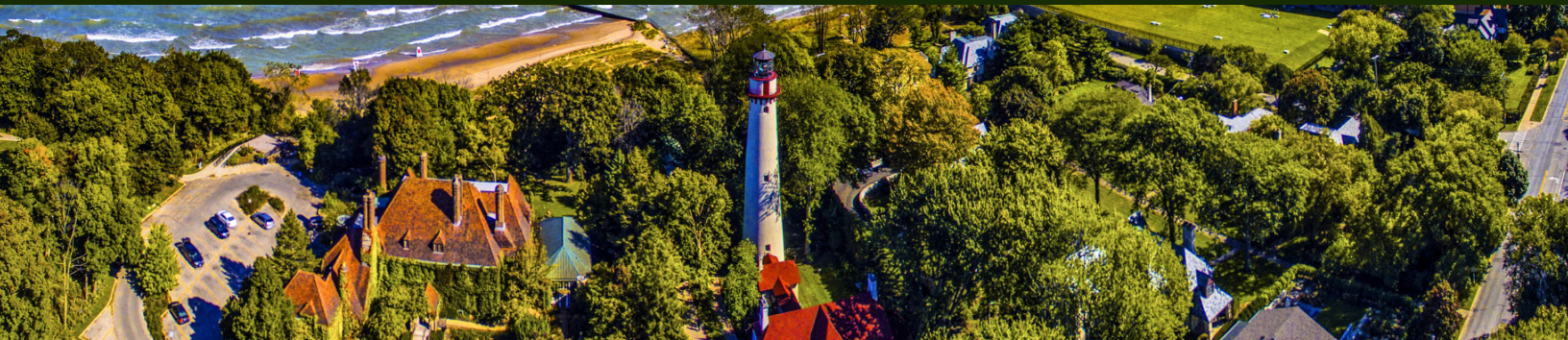


A Guide to Planned Giving at ECF



Why Make a Planned Gift to ECF?

At the Evanston Community Foundation (ECF), we understand the value of building a legacy that lasts. By making a planned gift to ECF, you can ensure that your values and passion for the Evanston community will live on through strategic investments in local programs and initiatives. **Our expert stewardship of your gift guarantees that it will continue to grow and support the causes you care about for generations to come.**

ECF is uniquely positioned to ensure your legacy not only endures but thrives. Through our work, your planned gift will help secure the future of Evanston and its residents, creating meaningful impact in perpetuity. Read on to discover the ways you can make a planned gift and leave a lasting mark on our community.

ECF'S FOREVER FUND

The Forever Fund is an unrestricted, endowed fund supporting ECF's work across Evanston. Planned gifts to the Forever Fund will support the following strategic efforts:



ADVANCING JUSTICE

by channeling resources to systemic change initiatives



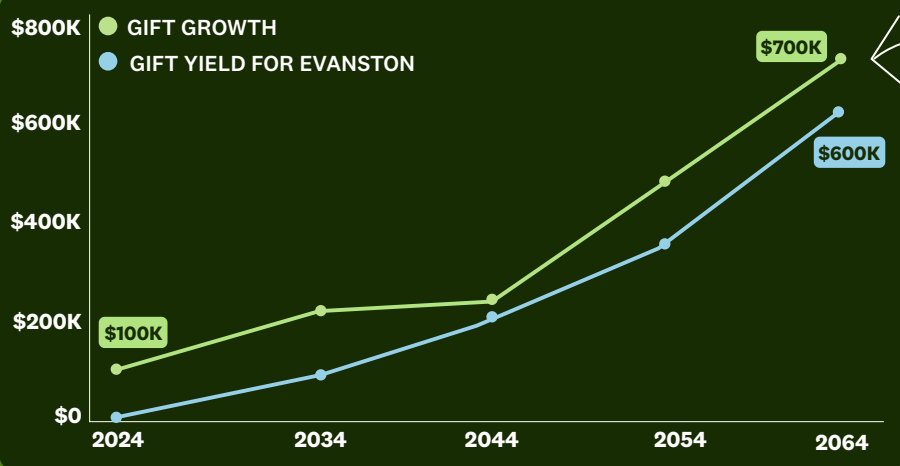
INVESTING IN EVANSTON

through Community-Led Grantmaking and support to local nonprofits



EMPOWERING LEADERS

through leadership development programming that embraces the knowledge and skills of all Evanstonians



A Gift that Grows

A gift to the Forever Fund will grow and give in perpetuity. For example, a gift of \$100,000 to the Forever Fund today would grow to \$700,000 and provide an additional \$600,000 to Evanston by 2064.

The Legacy Society

When you include ECF in your estate plans, we will welcome you into the Legacy Society— a special group of forward-thinking individuals who have pledged to support Evanston's future.

BENEFITS OF JOINING:

- Recognition in our annual report and on our website (unless you prefer to remain anonymous)
- Invitations to special events
- The opportunity to create a named endowed Forever Fund with a gift of \$50,000 or more

By joining the Legacy Society, you demonstrate your commitment to ensuring that the community you love continues to thrive.

“ Legacy isn't just about money. It's about the values and ethics we pass on. My parents didn't have wealth, but they gave me a legacy of morals and principles. Now, I have the opportunity to leave a monetary legacy to the Evanston Community Foundation, ensuring those values live on in our community. ”



JOYCE DAVIDSON

LEGACY SOCIETY MEMBER



Legacy Society Members Edna and Larry TerMolen

Contact Us:

For more information about planned giving, please contact us at:

Evanston Community Foundation

500 Davis Street, Suite 702

Evanston, IL 60201

(847) 492-0990

development@evanstonforever.org

How to Include ECF in Your Estate Plan

Including ECF in your estate plan is a simple yet powerful way to invest in Evanston's future. Here are a few ways you can make a lasting impact:

BEQUEST:

Name ECF as a beneficiary in your will, trust, IRA, life insurance policy, or donor-advised fund by specifying a dollar amount or percentage.

REAL ESTATE OR OTHER ASSETS:

You can leave ECF real estate or other valuable assets.

CHARITABLE GIFT ANNUITY:

CGAs are a great way to combine philanthropy with financial planning, ensuring a thriving future for you and for Evanston.

CREATE A NAMED FOREVER FUND:

Establish a fund in honor of your family, your legacy, or a loved one.

When planning your gift, please use the official legal name: Evanston Community Foundation.

Always consult your tax or legal advisor to discuss the best options for your unique situation.

Our Tax ID number is 36-3466802.

Name(s): _____

Phone: _____

Email: _____

Address: _____

City/State: _____

Zip: _____

☐ **I/We would like to be contacted to learn more about planned giving at ECF**

☐ **I/We have already included ECF in our estate plan and will share this form with the Foundation for their records**

VALUATION

Based on information available as of this date, I/We estimate that my/our testamentary gift of _____% of our estate to ECF has a current value of approximately \$_____.

My/Our planned gift will be made through the following instrument:

(e.g. will, retirement asset, annuity, etc.)

DOCUMENTATION

Your legacy gift is very special to ECF and to Evanston, and we want to be sure to accurately fulfill your expectations. Please provide a copy of the section of your estate plan that states your wishes.

☐ I/We will provide the relevant Foundation provision of my beneficiary designation.

☐ I/We would not like to share our specific documentation yet, but we are happy to share the news of our commitment.

RECOGNITION

☐ I/We authorize the Evanston Community Foundation to publish my/our name/s as members of the **Legacy Society** as follows:

Please print name/s.

☐ Please do not publish my/our name/s.

Signature Date

We encourage donors to review their estate plans with their attorney and financial advisor.

This Testamentary Gift Intention is non-binding.

Please mail or scan a copy of this form to:

Evanston Community Foundation

500 Davis Street, Suite 702

Evanston, IL 60201

(847) 492-0990

development@evanstonforever.org