**Tax Foundation**

**Legacy Society Enrollment Form**

Including the Tax Foundation in your estate plan is one of the most important statements you can make about your values during your lifetime. It is a wonderful way to leave a legacy reflecting your life. To become a member of the Tax Foundation’s Legacy Society you must include the Tax Foundation in your estate plan.

By sharing your gift intentions with the Tax Foundation, you will help us better plan for the future and ensure a brighter tomorrow!

Full Name (First/Middle/Last): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DOB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse’s DOB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City/State/Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mobile Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name(s) as you would like to see recognized on your certificate suitable for framing:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please check the type of planned gift you’ve chosen to benefit the Tax Foundation.

( ) WILL ( ) OTHER

( ) TRUST ( ) 401K or 403B PLAN – Beneficiary

( ) INSURANCE – Beneficiary ( ) IRA - Beneficiary

What is the estimated value of your Planned Gift to the Tax Foundation? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By sharing with us the value of your planned gift, the Tax Foundation will be able to better plan for the future fighting for sound tax policy. We understand that “life happens” and the value of your gift or your gift intentions may change.

We ask that you consider sharing your documentation with Tax Foundation staff so that we may review your gift plans to ensure your gift does what **you** want it to do. This material is highly confidential and will only be reviewed by members of the Tax Foundation’s Development team.

( ) Yes, I have attached a copy of the section of my will that applies to the Tax Foundation. I understand this information will be kept confidential.

( ) No, I prefer to keep it private.

Please also let us know how you feel about recognition:

( ) Yes, I would like to be recognized as a Tax Foundation Legacy Society Member(s) and you may include my name (and/or my spouse’s/significant other’s name) in literature, annual reports and/or donor profiles in recognition of my/our support of the Tax Foundation Legacy Society.

( ) No, I/we prefer to remain anonymous Tax Foundation Legacy Society member(s). Do not include my/our names in any public venue, but am/are happy to be recognized personally by Tax Foundation staff.

Thank you for taking these important steps! Your support will ensure that the Tax Foundation has the necessary funds to continue our fight for smart, sound tax policy!

*Please complete both pages of this form, print, and return it, and any supporting documentation, via the mail to: Tax Foundation Attn: Dave Messics, 1325 G Street NW, Suite 950, Washington, D.C., 20005.*

*Or, you may submit the completed form and any supporting documents as attachments via email to:* dave@taxfoundation.org*.*