

## Deferred Giving or Living Legacy Commitment Form

Gifts as will bequests, real estate, securities, life insurance, or annual gifts will ensure the ongoing work of the Owatonna Foundation. All gifts, large or small, are greatly appreciated and enable us to continue to preserve our history and respond to the changing needs of our community.

You may also choose to make a donation to the Foundation as a "Living Legacy" gift at any time. The minimum amount for a "Living Legacy" gift is \$10,000.

All gifts are deductible charitable contributions for tax purposes.

I/we are willing to express our commitment to leave a legacy to the Owatonna Foundation in the following way (please check all that apply):

- Bequest in Will
- Beneficiary Designation
  - Life Insurance
  - Annuity
  - Retirement Plan
- Gift of Real Estate
- Life Income Gift
- Trust
  - Charitable Remainder
  - Charitable Lead

I/we prefer to give a "Living Legacy" gift in the amount of:

\_\_\_\_\_

**This gift was made by:**

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

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

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

*Note: The way your name(s) is listed is the way that it will appear in public acknowledgments of Foundation donors.*

- I/we would like to remain anonymous.

**Please mail this signed form to:**

Owatonna Foundation Legacy Society  
P.O. Box 642  
Owatonna, MN 55060

*This form only expresses my/our intentions, it is not a pledge of support, and will remain confidential upon request.*

Print Name(s): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**For more information:**

call: 507-455-2995 - email: [info@owatonnafoundation.org](mailto:info@owatonnafoundation.org) - or go to: [www.owatonnafoundation.org](http://www.owatonnafoundation.org)