



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.

There are a couple of ways to join the Legacy Society and many gifting levels for your commitment:

Legacy Commitment

A Legacy Commitment is a planned commitment to provide a meaningful future gift to the Owatonna Foundation in a number of possible ways such as:

- ☐ Bequest in Will
- ☐ Beneficial Designation
 - ☐ Life Insurance
 - ☐ Annuity
 - ☐ Retirement Plan (IRA, 401, etc.)
- ☐ Real Estate
- ☐ Life Income Gifts
- ☐ Trust
 - ☐ Charitable Remainder
 - ☐ Charitable Lead
- ☐ My intended Legacy Gift \$_____

A Legacy Commitment is planned but not a legal commitment as we understand personal situations may change over time.

Living Legacy

A Living Legacy gift is an immediate gift to the Owatonna Foundation in an amount of \$10,000 or more. A Living Legacy member will qualify to join the Owatonna Foundation's Legacy Society.

☐ I/We would like to give a Living Legacy Gift to the Owatonna Foundation in the amount of \$_____

☐ I/We would like to make a \$1,000 Annual Gift to the Owatonna Foundation for 10 years.

☐ I/We would prefer to remain anonymous as a Legacy Society Member.

Legacy Status

Donors become eligible for the Legacy Society by commitment, Living Legacy Gifts, and annual gifts*. With the donors permission, cumulative contributions will be counted towards Legacy status and will be recognized accordingly.

Legacy Levels:

- ☐ Legacy Society Member (gifts/commitments of \$10,000)
- ☐ Bronze Level Member (gifts/commitments of \$25,000)
- ☐ Silver Level Member (gifts/commitments of \$50,000)
- ☐ Gold Level Member (gifts/commitments of \$100,000)
- ☐ Platinum Level Member (gifts/commitments of \$250,000)
- ☐ Diamond Level Member (gifts/commitments of \$500,000+)

Name(s)_____ Date:_____

Signatures_____

For more information:

Call: 507-455-2995 Email: info@owatonnafoundation.org Web: OwatonnaFoundation.org
We are a 501(c)(3) charitable organization Fed ID # 41-6038547

* Please let us know if there are any discrepancies in your Legacy Society level as a member.

■ preserving the past ■ building the present ■ funding the future