



# SUMMIT SOCIETY

## NOTIFICATION OF INTENT

### CONFIDENTIAL

#### 1. CONTACT INFORMATION:

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

Address \_\_\_\_\_

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

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

#### 2. METHOD OF GIVING:

My/our gift to Blue Mountain Community Foundation is through the following:

*(Please check all that apply)*

- Bequest in my/our will
- Charitable Remainder Trust
- Life Insurance
- Retirement Account
- Other \_\_\_\_\_

*Please attach a description or a copy of the instructions found in your Will or other document pertinent to Blue Mountain Community Foundation.*

#### 3. GIFT VALUE:

My/our gift is worth approximately:  
 I/we wish to keep the value of my/our gift private at this time.

#### 4. Acknowledgement:

Your legacy gift to Blue Mountain Community Foundation makes you a Fellow of The Summit Society, an association that honors and recognizes individuals who have confirmed their commitment to the future of the Blue Mountain area by making a planned gift.

I/we would like to be listed in the Blue Mountain Community Foundation Summit Society as follows: \_\_\_\_\_

Please keep my intentions anonymous.

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

This agreement is non-binding.

**Please return to: Summit Society, Blue Mountain Community Foundation,  
P.O. Box 603, Walla Walla, WA 99362**



## WHAT IS THE SUMMIT SOCIETY?

1. The *Summit Society* recognizes individuals and couples who have named the Blue Mountain Community Foundation as the beneficiary of any type of planned or deferred gift. The purpose is to acknowledge and thank those who have made these gifts and to encourage and inspire others to do the same.
2. Fellows of the *Summit Society* are listed in the Foundation's annual report and on the community foundation website. We would love to add your name to the list. Summit Fellows, of course, are invited to all of the Foundation events.
3. Joining the *Summit Society* requires two steps. First arrange, for a planned gift in favor of the Foundation. Second, inform the Foundation in writing that you have created a planned gift.
4. You are not required to tell how much is being left to the Foundation. You are, however, encouraged to discuss your plan with us to make sure we comply with your wishes. We believe this is important because your gift will be endowed and grants from it will be made in perpetuity. Telling us the name you would choose for your Fund and your plans for grantmaking assures you that your plans will be followed exactly as you have outlined.
5. Bequests from a Will are the most common way to leave a gift to the Foundation. However, some have made the Foundation the beneficiary of 401 K/IRA plans or insurance policies. Others have established a Charitable Remainder Trust in favor of the Foundation, or use other methods. All types of gifts qualify you for fellowship in the *Summit Society*.
6. Finally.... **Thank you.** We are so pleased, through the *Summit Society*, to recognize the people who are planning for gifts today that will provide significant benefits to area communities in the future. Because of the generosity of people like you, the Blue Mountain area will continue to be wonderful place now and for generations to come!