

**Marshall County Community Foundation, Inc.  
The John Marshall Legacy Society  
Plymouth, Indiana**

John Marshall (1775 – 1835) is considered by many as one of the greatest jurists that ever served on the Supreme Court of the United States of America. His tenure as Chief Justice of the Supreme Court (1801 – 1835) produced some of the most important decisions that have become fundamentals of U.S. law and shaped our country's way of life. Truly, Chief Justice Marshall was a man who accomplished much during his life and, by his actions, left a positive legacy that has affected many generations beyond his mortal years. In recognition of his life's work, Marshall County, Indiana was named in his honor on February 7, 1835.

Like Chief Justice Marshall, some very thoughtful individuals have chosen to leave a legacy from their life's work and they have one thing in common: all have made a commitment to support the future of Marshall County through a planned gift. They have worked hard, saved wisely and invested well. They understand the power of endowment. And they know that the assets they leave with the Marshall County Community Foundation will continue to grow, supporting good works for generations to come.

Too often, these gifts are unrecognized because they come at the end of the donors' lives. In appreciation of their kindness and in the spirit of gratitude, the Marshall County Community Foundation established the John Marshall Legacy Society to honor our generous and forward-thinking planned gift donors. Living members have made known to us their plans to provide future support through a bequest or other planned gift. We also recognize, in perpetual memory, those individuals who have donated a legacy through their estate

### **BENEFITS OF MEMBERSHIP**

Members of the John Marshall Legacy Society of the Marshall County Community Foundation are invited to take advantage of the following opportunities.

Name your charitable fund to honor the name of your family or loved ones.  
*(\$5,000 minimum required for a separate fund. Lesser amounts welcome for existing funds.)*

Share your personal history through stories and photographs for future generations who will receive grants from your fund.

Attend special events designed for generous people who have provided for Marshall County Community Foundation in their estate plans.

Receive recognition in Marshall County Community Foundation publications so that others might follow your example of community stewardship and leadership. You may, of course, choose anonymity instead.

Accept a certificate of appreciation and a John Marshall Legacy Society lapel pin, which modestly conveys our appreciation for your planned gift commitment and makes a statement about your belief in the importance of the Marshall County Community Foundation mission.

Subscribe to *GiftLegacy* e-newsletter, an informative weekly publication featuring information about finances and gift planning.

## **PLANNING FOR AN ESTATE GIFT**

Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For many people, these include preserving the family name, honoring loved ones, providing for heirs, minimizing tax burdens and supporting the community they call home.

Through an estate gift, you can support the arts, improve education, protect the environment, provide human services, safeguard health, foster a stronger community, or enrich young lives... and more. At MCCF, we are knowledgeable about local needs and agencies. We can help you decide on a plan that will support the charitable causes you care about most...in Marshall County and elsewhere.

When you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Anyone with a desire to give can make a legacy gift. Many people give assets including IRAs, securities, real estate, insurance benefits, and cash.

To get started, request a free copy of our guide “Planning for the Future” to assist you in reviewing your assets. Then, we recommend that you consult with your financial or legal advisor, who can provide professional guidance related to your specific estate, beneficiaries, income goals, taxes, and other considerations. If desired by you and your advisor, we can provide confidential philanthropic services without pressure or obligation.

Bequests to the Marshall County Community Foundation are exempt from estate taxes. We acknowledge and respect those who wish to remain anonymous, but we urge you to let us know of your plans on a confidential basis in any case. It supports Marshall County Community Foundation’s planning for the future.

## **THE NEXT STEPS**

Leaving a legacy that can impact the lives of many is as simple as 1-2-3.

1. You include a bequest to the Marshall County Community Foundation in your will or arrange a life income gift. When you notify us of your decision, you automatically become a member of the John Marshall Legacy Society. Of course, you may choose anonymity instead.
2. Upon your passing, we establish a fund in the name you’ve chosen.  
*(\$5,000 minimum required for a separate fund. Lesser amounts welcome for existing funds.)*
3. We invest the principal and make grants from the fund in perpetuity, handling all administrative tasks.

## **STATEMENT OF INTENTION**

You can leave a legacy that will support your philanthropic passion forever. By designating a portion of your estate for future good works, you can endow a charitable fund in your name (or another name you choose) at the Marshall County Community Foundation.

Please complete the information as requested:

*The Marshall County Community Foundation is included in my/our estate plans as follows:*

<b>Gift Type:</b>	<b>Approximate Gift Value</b>
Bequest or revocable trust	\$ _____
Charitable Remainder Trust – Irrevocable beneficiary	\$ _____
Charitable Remainder Trust – Revocable beneficiary	\$ _____
Beneficiary of a life insurance policy	\$ _____
Beneficiary of IRA or qualified retirement plan	\$ _____
Other _____	\$ _____

*Please describe (or attach a copy of) the instructions found in your will or trust pertinent to this gift or complete the following information.*

<b>Please credit my planned gift to the following:</b>	<b>% Percentage</b>
The _____ Fund	_____ %
The Marshall County Community Foundation General Endowment	_____ %
The Marshall County Community Foundation Operating Endowment	_____ %

*Total percentage distribution should equal 100%*

(Over)

## **OPTIONS**

- ☐ I/we authorize the Marshall County Community Foundation to list the following name(s) as members of the John Marshall Legacy Society.  
\_\_\_\_\_
- ☐ I/we have made provisions for a gift, but do not wish to be listed as members of the John Marshall Legacy Society at this time.
- ☐ I/we would like to share my/our story in the Marshall County Community Foundation's annual report or other publication.
- ☐ I/we am/are interested in including the Marshall County Community Foundation in my/our estate plan. Please contact me/us with more information.
- ☐ I/we am/are interested in including the Marshall County Community Foundation in my/our estate plan. I/we would like you to meet with me/us and my/our professional advisor.

Signature and date \_\_\_\_\_

*This Statement of Intent is nonbinding.*

## **CONTACT INFORMATION**

Name \_\_\_\_\_

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

Address \_\_\_\_\_

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

Professional advisor \_\_\_\_\_

Firm Name \_\_\_\_\_

Firm Phone \_\_\_\_\_ E-mail \_\_\_\_\_

*Thank you for preserving a portion of your estate to support your philanthropic passion through endowment funding at the Marshall County Community Foundation.*

## **MEMBERS**

### **Deceased**

Ruth and Lawrence Castaldi

James R. Cook

Inez Humbert

Dorothy E. Kinney

Wilma Leman

Elizabeth S. Marshall

Floyd R. Mattix

Herman and Florence Mattix

Mary C. and Samuel E. Perkins

Dorothy L. Peterson

Ralph C. Vonnegut, Jr.

### **Living**

Marjorie Ann Baker

Larry R. Linhart

Sam and Karen Schlosser

John R. and Beverly J. Wien

Approved by the Executive Committee of the Board of Directors on 7-26-2010