



## Legacy Society Enrollment

The **Legacy Society** comprises those generous individuals and couples who have chosen to support the Club's mission long into the future by including City Club of Portland in their estate plans.

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Common forms of **Legacy Society** participation include:

### *Outright Bequests*

Include language in a will or living trust saying "I hereby give and bequeath to the City Club of Portland for its general endowment fund [or research endowment fund] \_\_\_ per cent of the rest, residue, and remainder of my estate (or, alternatively, the sum of \$\_\_\_\_\_)." A legal professional can accomplish this through a new will or trust, or a codicil to an existing document.

### *Beneficiary Designations*

Update the beneficiaries of a life insurance policy (term or whole life) or a retirement plan (IRA, pension, 401(k), or 403(b) account). Name the Club as a primary, joint, secondary, or contingent beneficiary. Beneficiary forms can often be accessed or downloaded on-line, or a representative of the company may help.

### *More Complex Arrangements*

Other ways to participate, such as gift annuities and charitable remainder unitrusts, can be arranged through the Oregon Community Foundation. These have more complex tax implications, but can be attractive to some.

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Please count me/us as a member of the **Legacy Society** of the City Club of Portland.

I/we have included the Club in my/our estate plans, and you may list me/us among the other generous individuals and couples planning for the Club's posterity.

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

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

Phone/e-mail: \_\_\_\_\_

Signed: \_\_\_\_\_

*Date*

### OPTIONAL INFORMATION

- I/we have specifically designated the Club's General Endowment
  - I/we have specifically designated the Club's Research Endowment
  - I/we wish to remain anonymous
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Please return to: City Club of Portland, 901 S.W. Washington Street, Portland, OR 97205