



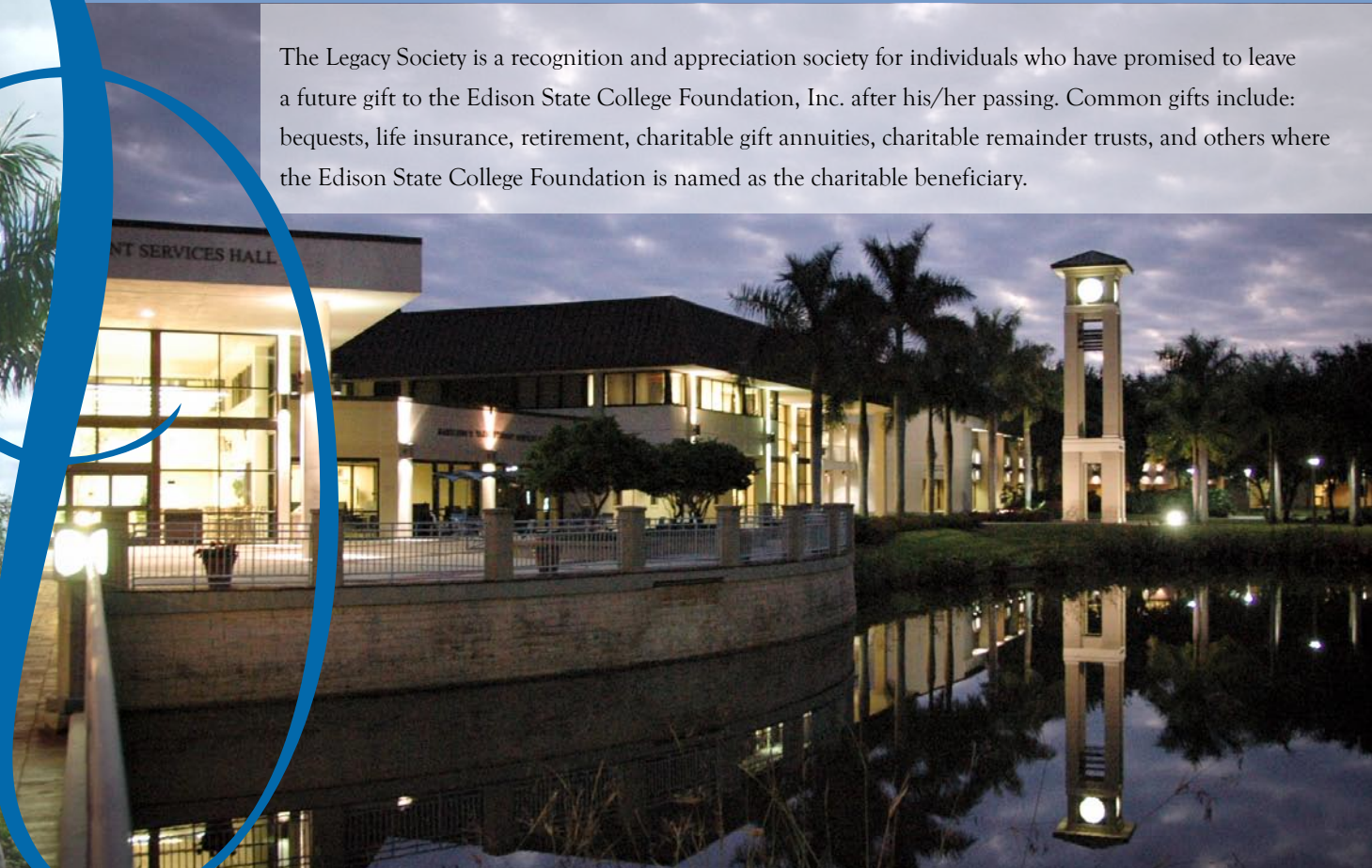
EDISON STATE
COLLEGE

Foundation, Inc.

Legacy Society

What is the Edison State College Legacy Society?

The Legacy Society is a recognition and appreciation society for individuals who have promised to leave a future gift to the Edison State College Foundation, Inc. after his/her passing. Common gifts include: bequests, life insurance, retirement, charitable gift annuities, charitable remainder trusts, and others where the Edison State College Foundation is named as the charitable beneficiary.



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*The true meaning
of life is to plant
trees, under whose
shade you do not
expect to sit.”*

~ NELSON HENDERSON

How can I join?

Anyone can become a member of the Legacy Society, but commonly our members are loyal donors, event donors, former and current faculty members, former and current staff members, alumni, and members of the community who believe in the value of higher education and who want to ensure the future educational needs of students at Edison.



What are the criteria?

Usually, a donor will contact the Edison State College Foundation to indicate his/her intent for a planned gift. We ask that donors use the “Letter of Intent” form that specifies the type of gift they will give and helps the donor indicate their preference on how the gift should be used. There is no restriction on revocability or irrevocability for members of the Legacy Society.* Donors have the right to change their bequest and gift documents at any time. For accounting purposes, we ask that donors provide a copy of the pages that reference the Edison State College Foundation from the gift instrument.

**for pledge, capital campaign commitments, naming opportunities, irrevocability may be required.*

What are the benefits?

The Legacy Society gives the Foundation an opportunity to say “thank you” today for a gift that will benefit the College tomorrow. We value your contribution and strive for open communication, close connection, and deep appreciation for your support. Members will be listed in our annual report, receive invitations to special events for the College, have the opportunity to participate in special tours of the campus and meet one-on-one with faculty, staff and students. Your participation in any event is voluntary; we honor any request for anonymity.





What steps do I take?

I HAVE NAMED THE EDISON STATE COLLEGE FOUNDATION AS A CHARITABLE BENEFICIARY AND I'D LIKE TO BECOME A MEMBER. WHAT DO I DO NOW?

First of all, thank you for your support and generosity! The next step is to inform the college of your intent. You can do this in a variety of ways: 1) you may contact the foundation and request a one-on-one visit with our planned giving professional to discuss your specific intentions for your gift; or 2) you may request a "letter of intent" document to specify the details of your gift, and when completed, return to the Edison Foundation. We will then add you to the Legacy Society membership list and you will receive an official welcome kit outlining the benefits of membership.

I HAVE NOT YET NAMED THE EDISON COLLEGE FOUNDATION, INC. AS A CHARITABLE BENEFICIARY. HOW CAN I BECOME INVOLVED?

To assist you as you make your charitable plans, we've created a helpful tool, "Determining Your Legacy," to guide you in determining your charitable values and provides information on the many different types of gifts. Also, we advise all donors to seek the counsel of a qualified professional advisor (estate attorney, CPA, financial advisor, insurance agent, etc.).

Creating a charitable legacy is an important process that will involve input from many trusted advisors. If you have questions about the next steps, please contact the Edison State College Foundation, Inc. at 239-489-9210. Or you can visit our website at www.edison.edu/foundation for more information about the Legacy Society and how to make a planned gift.



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