

LEGACY SOCIETY

HOW TO BECOME A MEMBER

What is the Florida South Western State College Legacy Society? The Legacy Society is a recognition and appreciation society that is made up of individuals who have promised to leave a future gift to the Florida SouthWestern State College Foundation, Inc. after his/her passing. Common future gifts include: bequests, life insurance, retirement, charitable gift annuities, charitable remainder trusts, and others where the Florida SouthWestern State College Foundation is named as the charitable beneficiary.

“Every good act is charity. A man’s true wealth hereafter is the good that he does in this world to his fellows.” — MOLIER

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.

“Good actions give strength to ourselves and inspire good actions to others.” — PLATO

Who can become a member? 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 FSW.

“The way you get meaning into your life is to devote yourself to loving others, devote yourself to the community around you, and devote yourself to creating something that give you purpose and meaning.” — MITCH ALBOM

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What are the criteria? Usually, a donor will contact the Florida SouthWestern 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 Florida SouthWestern State College Foundation from the gift instrument.

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

“Where there is charity and wisdom, there is neither fear nor ignorance.” — ST. FRANCIS OF ASSISI

I have named the Florida SouthWestern 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 download (or request by mail) the “Letter of Intent” document to specify the details of your gifts. Complete and sign the form, and mail it the Florida SouthWestern State College 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. Also, you will receive copies of any of the original documents you mail to us, and, if you like, we can also send documentation of your intent to your professional advisor.

“Education is not the filling of a pail, but the lighting of a fire.” — WILLIAM BUTLER YEATS

I have not named the Florida SouthWestern State College Foundation as a charitable beneficiary. How can I get started? We’ve created a helpful tool to assist you, “Determining Your Legacy.” This resource will help you determine 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.).

“Generosity consists not in the sum given, but the manner in which it is bestowed.” — MAHATMA GANDHI

Creating a charitable legacy is an important process that will involve input from many trusted advisors. If you have questions about the planning process, please contact the Florida SouthWestern State College Foundation, Inc., 239-489-9210. Or you can visit our website at www.fsw.edu/foundation for detailed examples of how other donors decided to leave their legacies.