

A CAMPAIGN FOR UPPER ARLINGTON

UNITING AND ADVANCING PHILANTHROPY | FOR EVERY NEIGHBOR. FOREVER.

Leave a Legacy

Plant something that outlives us all.

A legacy gift is a promise to the future — support that reaches Upper Arlington long after today, and often costs nothing during your lifetime. It becomes part of a permanent resource that adapts to whatever UA needs next: the capacity to say **yes**, for generations of neighbors you'll never meet but will help all the same.

You can trust it will be well stewarded. In 20 years we've invested more than **\$12 million** in the places we gather, the causes we believe in, and the neighbors we help. The Amelita Mirolo Barn. The Bob Crane Community Center. The Good Neighbor Fund. Leadership UA.

And so much more.

Ways to leave a legacy

- **Bequest by will or trust** — give a fixed amount, a percentage, or the remainder of your estate, tax-free.
- **Retirement plan** — name UACF as beneficiary of your IRA or 401(k) — often the smartest asset to give, leaving tax-free assets to family instead.
- **Life insurance** — name UACF as beneficiary, or transfer a policy you no longer need for a deduction today.
- **Tribute & memorial gifts** — honor or remember someone special, or establish a fund in their name.

Many of these cost nothing today and take minutes to arrange with your advisor.

The Legacy Society

Let us know your intention and we'll welcome you into the Legacy Society — so we can thank you and honor your commitment in your lifetime. Your plans stay entirely your own, and revocable at any time.

To join, complete the Confirmation of Legacy form on the reverse. →

The Foundation does not provide legal or tax advice; please consult your attorney or financial advisor. Tax ID: 20-5860971

Legacy Society

The Upper Arlington Community Foundation was established in 2007 to enhance life in Upper Arlington — a home for philanthropy, the place to create and celebrate your Upper Arlington legacy, pride, and roots. The Legacy Society recognizes those who have named the Foundation as a beneficiary in their will, trust, retirement account, insurance policy, or other planned gift.

By notifying the Foundation of your gift intentions, we celebrate you today, tomorrow, and always. This confirmation ensures your future gift will be used in accordance with your wishes.

Confirmation of Your Upper Arlington Legacy

Donor Name(s)

Recognize Publicly As

Mailing Address

Phone

Email

Please Describe Your Gift

(or attach a copy of your gift documentation)

- ☐ I/We have already made a legacy gift provision in my/our estate plans
- ☐ I/We plan to make a legacy gift provision in my/our estate plans

Type of Gift

- ☐ Will or living trust
- ☐ IRA, pension, or other retirement account
- ☐ Other (please specify): _____

Purpose of Your Gift

- ☐ Greatest need of the Foundation
- ☐ Other (please specify): _____

Signature Date.....

Signature Date.....

This is not a legally binding document. By signing this form, you acknowledge your current plans to benefit the Upper Arlington Community Foundation in the future. All information will be kept private and confidential.

THANK YOU FOR INCLUDING THE FOUNDATION IN YOUR ESTATE PLANS

Return to: Upper Arlington Community Foundation · 3600 Tremont Road, Upper Arlington, OH 43221 · Tax ID 20-5860971