



YOUR LEGACY. YOUR PLAN.

MEET WITH US

Meet with a Community Foundation staff member to discuss your charitable goals and vision for the future. Learn more about how the Community Foundation connects caring individuals with the community's most pressing needs.

CREATE A PLAN

A Legacy Plan is a document that will guide the Community Foundation in carrying out your future charitable wishes. We can keep it simple, or create a detailed plan. Either way, a Legacy Plan can help you to create community impact and preserve your charitable legacy for years to come. We offer two main options, which may be used separately or in tandem, depending on your preference and availability.

FACILITATED MEETINGS

Community Foundation staff members can meet with you to guide you through a series of exercises and values-based discussions in order to create a custom Legacy Plan, which will be used to capture background information and instructions for your charitable legacy fund.

SELF-GUIDED WORK

Our Legacy Plan workbook is designed to help you document your unique giving story, in your own words. The workbook is available in two different formats – digital and print. Using tools like the written exercises in the workbook, you will have the option to craft a custom letter to the Community Foundation expressing your wishes for the future use of your legacy fund.

FINALIZE PLAN

A copy of your Legacy Plan will be kept on file at the Community Foundation to govern the future use of your charitable legacy fund. You may add to or revisit your Legacy Plan at any time. Planning services are offered on a complimentary basis. No administrative fees apply until a fund is created.

JOIN THE LEGACY SOCIETY

Donors who intend to leave a future gift to the Community Foundation through their estate are members of our Legacy Society. You will have the option to be recognized in our published materials or remain anonymous. You will also receive invitations to occasional social and informational events, where you will meet others who share your care for the community.

**WRITING WORKSHOPS
AND WORKBOOK**

**ATTEND SOCIAL AND
INFORMATIONAL EVENTS**

**SHARE YOUR STORY WITH
OTHERS**

Contact us to learn more about our legacy planning services or request a meeting at 315.422.9538 or legacy@cnycf.org.

