



Heartland Legacy Society Membership

FUTURE GIFT STATEMENT OF INTENT

Dear Community Foundation Staff:

This Statement of Intent reflects my/our current plans to establish a new fund or support our existing fund at the Truman Heartland Community Foundation. I plan to endow support for my charitable interests by making one of the following types of planned gifts:

- _____ I have made plans in the form of an outright Bequest
- _____ I have made plans in the form of an IRA (or other Retirement Asset) Gift
- _____ I have made plans in the form of a Charitable Remainder Trust
- _____ I have made plans in the form of a Life Insurance Policy
- _____ I have made plans in the form of a Charitable Gift Annuity
- _____ I have made plans in the form of a Real Estate Gift

Additional details of my gift are as follows (Optional): _____

My future gift is expected to be received by the Truman Heartland Community Foundation from _____ (Advisor Name Optional: _____). Distributions from my Fund shall be used to:

Support the following field(s) of interest (see reverse): _____.
I understand that grants from my fund will be awarded at the Community Grants Luncheon each year.

and/or

Support the following charities: _____

and/or

Create to a Scholarship Fund to benefit: _____

Support my existing Scholarship Fund: _____

and/or

Support the charitable purposes as directed by my successor advisors to my Donor Advised Fund

Donor Signature

Donor & Spouse Name(s) (Please Print)

Phone: _____

Email: _____

By checking this box you are indicating that you **DO NOT** want to be recognized publicly for your future gift to the Community Foundation.



Heartland Legacy Society

Field of Interest Areas

<h3 style="text-align: center;">Community Enhancement</h3> <p>Funds created for this area of interest are the most flexible and allow the foundation to respond to the most pressing needs in the community today and as well as to the emerging needs in the future. They are not restricted to a particular service area and allow the foundation to respond to changing community needs. We currently have three funds in this category: <i>THCF Unrestricted Endowment, Independence Regional Health Center Community Services Endowment</i> and <i>Margaret Hurt Endowment</i>.</p>	
<h4>Community Action</h4> <p>Funds within this interest area are restricted to support community initiatives of THCF, community coalitions, nonprofits or local government entities. They support activities such as economic development, community events, strategic planning, and community initiatives to address a current need in the community. While we currently fund many grants in this category from our Community Enhancement Funds, we do not have funds specifically designated for this area.</p>	<h4>Health & Welfare</h4> <p>Some funds are restricted to support health programs in the community. A fund can be established for general health needs both physical and mental or could be restricted to a particular health need. We currently have several funds in this category (<i>THCF Health Fund, Marge Pollard Hospice Fund</i> – restricted to hospice services, <i>Homer McWilliams Fund</i> – restricted to cancer, <i>Marcella Morgan Oncology Fund</i> – restricted to cancer).</p>
<h4>Education</h4> <p>Other funds are restricted to enhancing education for all age groups. We currently have only one fund in this category. New funds in this area could be focused broadly on education or could be more specifically focused on a particular educational need or initiative. We currently have one fund in this category: <i>Family Literacy Fund</i></p>	<h4>Arts & Humanities</h4> <p>Some donors create funds that are restricted to support arts and humanities. We currently have one fund in this category (<i>Heartland Arts Alliance Fund</i> – restricted to performing arts).</p>
<h4>Social Services</h4> <p>These funds are restricted to human service needs in the community including emergency assistance, food assistance, job training, counseling, domestic violence services, services for the disabled, senior services, etc. While we currently fund many grants in this category from our Community Enhancement Funds, we do not have funds specifically designated for this area.</p>	<h4>Community-Focused</h4> <p>These funds are restricted to a specific community or geographic area. They are similar to the general unrestricted funds in that they allow the community foundation to respond to the most pressing needs of today and emerging needs in the future in a particular geographically defined area. We currently have one fund in this category (<i>J.D. Browning Trust</i> – restricted to Lee’s Summit).</p>