



As an organization committed to the past, present and future of Washtenaw County, we honor the legacies of those before us. We also want to be sure we honor your intentions for your legacy. By documenting your estate plans with AAACF, we are able to plan appropriately and ensure the careful stewardship of your legacy in our community.

Through the generosity of Helmut Stern, we are encouraging others to follow his example in making an estate gift for the future of Washtenaw County through the **Stern Legacy for Community Impact Match**.

When you document a planned or legacy gift with the Community Foundation—whether it’s ideally unrestricted for broad community impact or for a fund dedicated to a cause or to a specific nonprofit—we will provide a current 50% match of that projected gift value up to \$50,000 per donor. The current match will support AAACF’s community impact work—starting now, and forever. For estate gifts of at least \$10,000, this match creates a named Community Impact fund in your name, or that of someone you wish to honor.

Thank you for completing and returning this form.

Full name Dr. Mr. Mrs. Ms. _____

Nickname/preferred name _____

Spouse/partner name Dr. Mr. Mrs. Ms. _____

Spouse/partner nickname/preferred name _____

Address _____

Seasonal address _____

Please note dates for seasonal address _____

Email _____ Spouse/partner email _____

Phone (primary) _____ Phone (other) _____

Preferred method of contact Mail Phone Email Personal visit _____

Professional advisor(s) who helped with your estate plans _____

YES! I/we have included AAACF in my/our estate plans.

Bequest in will Life Insurance Beneficiary Other: _____

Charitable Remainder Trust Retirement Plan Beneficiary _____

My/our intentions are for a specific purpose.

Please share more detail around your intentions to help ensure that we carry out your legacy:

We are now completing fund agreement forms when appropriate to properly document your intentions and would be happy to discuss this with you. This process is especially valuable when you have a specific name for a future fund or a particular cause or organization you want to support.

To qualify for the Stern Legacy Challenge Match, estate gifts must be documented with AAACF and provide an estimated gift value.

Documentation of my/our legacy gift is attached.
(Example: beneficiary designation page of retirement plan naming AAACF.)

The projected value of my/our legacy gift: \$ _____

If my/our estate plans qualify, I/we would like the Community Impact Fund to be named:

Please consider sharing a paragraph about your intentions and commitment through establishing this planned gift and named fund. This information will be documented as part of the fund’s history, and may be shared publicly. We can help draft this story for you.