



WEXFORD FOUNDATION LEGACY SOCIETY



**THROUGH YOUR GENEROSITY, VISION
AND SUPPORT, THE LEGACY SOCIETY
WILL ENABLE THE WEXFORD FOUNDATION
TO REMAIN A FORCE FOR GOOD IN THE
LOWCOUNTRY FOR YEARS TO COME**



The Wexford Foundation

LEGACY SOCIETY

Is a legacy gift for you? Gifts by will, trust or beneficiary designation – also known as bequests, are the most common way people plan their legacies. Following requests by some of the Wexford members, the Foundation Trustees have created the Wexford Legacy Society to recognize those supporters who wish to be remembered or make a difference by including the Foundation in their estate plans.

The **Wexford Legacy Society** is open to any current or past members who wish to give back to the local community following their time at Wexford. For those who wish to be recognized for their contribution, the Foundation's Trustees have established recognition levels for donor bequests. Recognition levels start at \$25,000 (Gold) rising through \$100,000 (Platinum), to \$250,000 and above (Diamond).

Members who decide to include the Wexford Foundation in their estate



plans during 2022 at the gift level of \$25,000 or more will become Charter Members of the Wexford Legacy Society, helping to ensure that the Foundation can continue to improve the lives of those in need for many years to come.

If Wexford and the Hilton Head community has represented an important part of your life, please consider contributing to the Foundation and becoming a member of the Wexford Legacy Society. For additional information contact the Foundation Chair at chair@wexfordfoundation.com, any of the Foundation Trustees or www.wexfordfoundation.com.

ABOUT THE WEXFORD FOUNDATION

Established in 2012, the Wexford Foundation has gained recognition as a highly respected force for charitable giving in the Lowcountry. With over \$2 million in financial grants made to over 40 well-deserving local charities, the Foundation has provided much-needed assistance in the health, housing, hunger and education of less well-off adults and children on Hilton Head Island and the surrounding area. Through the enormous generosity of the Wexford membership, thousands of lives have been changed for the better - senior neighbors have retained their independence, young adults have gained language and literacy skills and improved their chances for success in the workforce, families have access to nutritional food, healthcare and affordable housing, and children have preschool and afterschool educational opportunities that they otherwise could not have.

By completing this form, you signify your intention to name the Wexford Foundation (the Foundation) as a beneficiary of part of your estate and your wish to become a member of the Wexford Foundation Legacy Society. The Society honors those who have made legacy gifts to the Foundation. The Foundation understands that all bequest provisions are revocable and that any intentions stated here are not binding on your estate. The Foundation is deeply grateful for your vision and generosity.



I have named the Wexford Foundation as a beneficiary of: (Check all that apply.)

- My Last Will and Testament
- Retirement Account
- Revocable Trust (Living Trust)
- Charitable Trust
- Life Insurance Policy
- Donor-Advised Fund

Other (please specify): _____

I estimate the total value of my gift to the Foundation through my estate will be \$ _____

I understand that the Wexford Foundation will use my gift for General Purposes and the Greatest Areas of Need.

I understand that my commitment to leave the Wexford Foundation a legacy gift through my estate entitles me to enrollment in the Wexford Foundation Legacy Society, and special recognition during events and publications.

- Yes, the Foundation may publish my name as a member of the Legacy Society.
- I am pleased to become a member of the Legacy Society, but wish to remain anonymous and request my name not be published in connection with my bequest intention.

Signature	Printed Name	Date
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Signature	Printed Name	Date
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To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of the appropriate sections of your will or trust for safekeeping in our confidential files. Thank you.

Legacy Society

FREQUENTLY ASKED QUESTIONS



1. Do I have to make a legally binding pledge to join the Legacy Society?

No. Your gift plans can be revised at any time should your circumstances change. This is part of the reason that legacy gifts are such a good fit for so many people.

2. I've named Wexford Foundation in my final plans, but don't feel comfortable disclosing the amount of my legacy gift publicly. Am I still able to join the Legacy Society?

Yes. While disclosure of the current value of the legacy gift amount to the Foundation is required to join the Legacy Society, we will keep the amount of your legacy gift private, if that is your preference, by not including your gift in Legacy donor levels when published.

3. Will I have to pay tax on the gift I leave in my will?

Any amount you leave to a charity will usually be exempt from inheritance tax, however we recommend that you consult your tax adviser regarding the tax implications specific to your circumstances.

4. Can I add a gift to Wexford Foundation into my existing will?

Yes. If you've already made a will and want to make an update, you can amend your will with a document called a Codicil.

5. Do I have to tell Wexford Foundation that I have left them a bequest in my will?

That is entirely up to you, though we would be pleased if you let us know so we can recognize your generosity and possibly use your support to encourage others.

6. Can I leave a bequest to Wexford Foundation in memory of a person?

Yes, a charitable gift is a wonderful way to recognize and remember someone you knew and who made a difference in your life. You can definitely specify this in your will.

7. What options do I have for specifying the value of my bequest?

You can specify a dollar amount, a percentage of your estate or the current value of any assets such as property, life insurance, charitable remainder trusts, valuables or other kinds of gifts.

8. Who should I contact to learn more about the Legacy Society?

Paul McEvoy (pmcevoy525@gmail.com) and Kurt Grindstaff (kgrindstaff01@gmail.com) are the Wexford Foundation trustees responsible for the development of the Legacy Society; however, any Wexford Foundation trustee will be able to assist.