

Statement of Intent



Too often in the past, generous gifts entrusted to Greater Worcester Community Foundation have gone unrecognized because they came at the end of the donor's life.

The Acorn Society provides a way to recognize and honor those individuals who plan to benefit the community foundation in the future. Donors who understand the importance of a permanent community endowment have trusted GWCF since 1975 to carefully manage and distribute their charitable funds. We hope you join this tradition of extraordinary generosity by adding your legacy to those of others.

Please complete this statement of intent to join our Acorn Society. This statement is non-binding.

Please include me/us in the Acorn Society (select one):

ANONYMOUSLY or LISTED AS: _____

I/We have made Greater Worcester Community Foundation a part of my/our deferred charitable giving using the following method(s):

Bequest in will

Life insurance beneficiary

Qualified retirement plan beneficiary (IRA, 401K)

Charitable Gift Annuity

Charitable Remainder Trust

Other _____

It is my/our intention that this gift be governed by (select one):

A separate letter of instruction related to this gift that I/we have already completed with the Foundation.

A separate letter of instruction related to this gift that I/we would like to schedule a meeting to complete. Please have Foundation staff contact me/us.

An existing fund and the associated agreement.

Signature

Name

Date

Telephone

Email

Signature

Name

Date

Telephone

Email