



SOUTHEASTERN
COMMUNITY COLLEGE

F O U N D A T I O N

Legacy Society

The SCCF Legacy Society consists of a unique group of philanthropists who will leave an enduring legacy by acting not for today, but for tomorrow. They are individuals who include a gift for the SCC Foundation for the benefit of Southeastern Community College in their estate plans. Anyone who submits documentation of his/her estate gift qualifies for membership, no matter the size of the gift.

The SCC Foundation offers an alternative to increasing taxes and tuition and gives the gift of a quality education to many who otherwise could not afford this important advantage.

The SCCF Legacy Society members are recognized in many ways, including:

1. Legacy Society pen
2. Name listing in the Foundation's annual report, if desired
3. Recognition at public events
4. Other benefits of membership as determined by the amount of the gift

Steps to Membership:

Once you decide to make an estate gift to SCC Foundation, inclusion as a Legacy Society member takes just three simple steps:

1. **Document Your Gift.** With the help of your professional advisors, include a gift to the SCC Foundation - through a bequest, life insurance, individual retirement account (IRA) or other retirement plan, or living trust - in your estate plan. A gift of any size qualifies you for membership.
2. **Submit Your Gift Plan Information Form.** Complete the SCCF Legacy Society Membership form. We will keep the details of your gift confidential, and you are welcome to decline public recognition.
3. **Copy the Foundation.** Send the Foundation's Executive Director a copy of your will, trust agreement or insurance policy. If you prefer, you may copy just the relevant part of your will or trust agreement or the cover and beneficiary pages of your insurance policy. If you and your spouse both seek membership and have separate wills, please submit copies of both documents. This applies also to trust agreements and insurance policies. If you have any questions about what may be required, please do not hesitate to contact the Foundation or have your advisor contact the Foundation.

Bequest Language

The language following this paragraph may aid you and your attorney in preparing your bequest to the SCCF for the benefit of SCC. Please note that the following sample language is intended only as a general guide for those preparing wills or trusts. All bequests to SCC should be designated with the SCC Foundation as the beneficiary. The SCC Foundation is recognized as of the official organization to receive and administer gifts and bequests on behalf of SCC.

I give, devise and bequest to the Southeastern Community College Foundation, a non-profit corporation organized in accordance with the laws of the State of Iowa for the purpose of supporting Southeastern Community College, an institution of higher education, with district offices in West Burlington, Iowa (check and complete all that apply).

- a. The sum of \$_____;
- b. The following described property:

- c. (_____ % of) the rest, residue and remainder of my estate.

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the SCC Foundation, but the gift shall be entered in the Foundation's books and records as the _____ Fund, and shall always be so designated. The distributions from the fund shall be used (check and complete all that apply)

- a. To further the purposes of the SCC Foundation in its support of educational functions of SCC;
- b. To provide scholarships for deserving students of SCC;
- c. To provide support for the _____ program at SCC (you may specify the program).

If you select a specific purpose for your gift, inclusion of the following sentence will ensure that the bequest remains useful through the decades.

If, in the judgment of the SCC Foundation board of directors, changed circumstances should, at some future time, render the designated use of this fund impracticable, unwise or inappropriate, then the board shall use the fund to further the objectives and purposes of SCC, giving consideration to my special interest as evidenced by the purpose described above.

If you choose to name the SCC Foundation as a beneficiary, [please let us know your plans](#).

Please contact Rebecca Rump, Executive Director of the SCC Foundation at 319.208.5065 for more information or to schedule a confidential appointment.¹

Neither SCC nor the SCCF make any representations that any such gift shall constitute a charitable contribution for the purposes of any deduction under the federal estate, gift or income tax laws, nor the laws of any state. However, the SCCF currently is a qualified charitable institution and has no reason to believe that such contribution would not qualify for any lawful deduction.¹

Southeastern Community College Foundation LEGACY SOCIETY Membership Form

To be included as a member of the SCC Foundation Legacy Society, please complete this information and click Submit, below. Alternately, you can [print out the instructions and form](#) to complete and send to the SCC Foundation by mail.

*** denotes required field.**

* First Name:

* Middle Name:

* Last Name:

E-mail Address:

* Street/P.O. Box:

* City:

* State:

* Zip Code:

* Home Phone: Please include your area code.

Business Phone: Please include your area code.

Fax Number: Please include your area code.

Attorney Name:

Attorney Email:

Attorney Phone: Please include area code.

I/we authorize the SCC Foundation to list the following names(s) as members of the Southeastern Community College Foundation Legacy Society.

Please indicate your gift(s) below:

- The sum of \$
- The following described property:
- % of the rest, residue and remainder of my estate.
- Other:

Please describe below the instructions found in your will or trust pertinent to the use and/or distribution of your gift to the Southeastern Community College Foundation:

- I/we have made provisions for a gift, but wish to be listed as anonymous members at this time.
- I/we would like further information about planned giving opportunities (e.g., bequests, charitable gift annuities, charitable remainder annuity trusts, charitable remainder unitrusts, life insurance, real estate, cash, stocks/securities, personal property, etc.).

This statement is non-binding.

Address for mailing purposes only:

Southeastern Community College Foundation
 Attn: Rebecca Rump, Executive Director
 1500 West Agency Road, P.O. Box 180
 West Burlington, IA 52655-0180

For questions, phone 319.208.5065 or send email to brump@scc Iowa.edu.

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 COMMUNITY COLLEGE
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