ETF Legacy Society
Membership Form

The ETF Legacy Society recognizes generous individuals who have made a commitment to the future of East Tennessee through creating or completing a Legacy Gift to a fund at East Tennessee Foundation. Please complete this form to assist us in recognizing you as a member of the ETF Legacy Society.

Name(s): 

Address: 

Street ______ City ______ State ______ Zip ______

Phone: ______ Email: ______

Please tell us how your name(s) should appear in published lists:

☐ Anonymous during my/our lifetime(s); may include name(s) as above afterwards.

☐ Anonymous (permanently).

1. My/our Legacy Gift:

☐ Was already transferred to and accepted by East Tennessee Foundation. (Please skip question 2.)

☐ Is in process and will be transferred to East Tennessee Foundation in the very near future.

☐ Is planned in my documents, but will ultimately depend on whether or when certain conditions or circumstances occur.

2. I/We intend that my/our Legacy Gift be used to:

☐ Support unrestricted grantmaking

☐ Grow the Fowler Operating Endowment Fund that supports ETF's operations

☐ Give back to my community through ETF's local affiliate fund

Affiliate fund/ community: _______________________

☐ Build existing fund(s): _______________________

☐ Create new fund(s) to be named (subject to minimum funding requirements):

If for a new fund, have you signed a fund agreement with ETF? ☐ Yes ☐ No
3. My/our Legacy Gift is/was a:

- [ ] Bequest under my/our Will(s)
- [ ] Beneficiary designation for: 
- [ ] My/our revocable living trust(s)
- [ ] Transfer-on-death designation
- [ ] Transfer of real estate interest during my/our lifetime*
- [ ] Transfer of privately held business interest during my/our lifetime*
- [ ] Charitable Lead Trust*
- [ ] Charitable Remainder Trust*
- [ ] Remainder interest of irrevocable trust*

*These types of gifts typically cannot be changed or undone once the gift asset is transferred to East Tennessee Foundation or the Trustee of an irrevocable trust. Please consult your attorney for specific questions or concerns.

I understand and agree to each of the following statements:

A. This form does not, by itself, create a binding obligation on me, my estate, or my executor/beneficiaries/heirs.

B. Whether or not the gift described above can be changed or cancelled depends primarily on the language of the separate, legal document that created the gift and whether or not the gift item or funds have been delivered to and accepted by East Tennessee Foundation under applicable law.

C. East Tennessee Foundation and its employees cannot provide me with legal or tax advice and I should consult with my own attorney or accountant if I have questions or concerns regarding the legal status or tax effects of my gift.

D. The purpose of this form is merely to provide information to assist East Tennessee Foundation in recognizing its donors, better serving community needs, and, more importantly, understanding and implementing my/our wishes if and when this gift is completed.

Signature: ___________________________________________ Date: ______________________

Signature: ___________________________________________ Date: ______________________