

# Legacy Society

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Deferred or planned gifts provide benefits at a later date. In fact, estate-planned gifts are particularly important to the Guild right now to insure long-term financial stability of our educational events and programming.

Membership in the Handbell Musicians of America's Legacy Society is open to anyone making a commitment of support for the Guild through his or her will, beneficiary designations, or other planned giving method. Members in the Legacy Society receive the following benefits: (1) Listing on the Guild's legacy wall recognizing donors who have made planned gifts to the organization; (2) Recognition in an annual listing in the guild's publications as a planned gift donor to the organization; and (3) An invitation to an annual Legacy Society recognition event hosted by the Board of Directors and Executive Director.

## **A Special Thank You to those currently supporting the guild through membership in the Legacy Society:**

Lee Afdahl	David G. and D. Linda
John & Christine Behnke	McKechnie
Lynn Bogovich	Susan C. Newman
Barbara Brocker	Ellen C. Moretz
Jennifer A. Cauhorn	John Pfeiffer
David R. & Judy Davidson	William A. Payn
Ruth M. Diedrichsen	Ann Y. Schmidt
Ginny Fleming	Deborah S. Rice
William H. Griffin	Sharon Schmidt
Robert Jackson	J. Stanley Schmidt
Elizabeth Judd	Felix & Martha Lynn
Jacques & Jean Kerns	Thompson
Zana J. Kizzee	D. L. Shearer
Mary V. Kettlehut	Frances S. Vaughan
Leslie Lewis	David L. Weck
Lynne G. Marks	Jessica Westgard
Micki Mennet-Martin	Kathleen Wissinger

If you would like to join the Legacy Society, please complete the form below. We encourage you to discuss and periodically review this gift with your legal, tax, and financial advisors who may have recommendations on tax-efficient strategies you could utilize for this gift.



*Enabling the future* – that's why I chose to be a part of the Legacy Society and name AGEHR/Handbell Musicians of America in my will as a recipient of a portion of my estate.

I have received so much from the organization from the time I began 47 years ago as a young ringer through today as I lead my own choirs and have the wonderful opportunity to teach and conduct and learn from other ringers and conductors. It is my sincere hope that Handbell Musicians of America will continue to provide significant opportunities for the advancement of handbell/handchime ringing in this country for many years to come.

I have actively invested in this hope through the Legacy Society and additional donations beyond my annual dues and I encourage you to do the same. Enable the future along with me!



# Legacy Society Enrollment & Renewal

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

**I (we) accept membership in the Legacy Society and qualify on the following basis:**

- ☐ I (we) have included the Guild in a will or living trust.
- ☐ I (we) have named the Guild beneficiary of a retirement account, insurance policy, or deferred annuity.
- ☐ I (we) have made other estate provisions for the Guild.
- ☐ I (we) would like to join the Legacy Society, but need assistance designing our giving plan.

**Please describe planned gifts\***

\_\_\_\_\_

\_\_\_\_\_  
\*Copies of documents where the Guild is named to receive a gift would be appreciated, but not required.

Approximate value of gift at this time \$ \_\_\_\_\_

**I (we) would like our gift applied:**

- ☐ To the Heritage Endowment Fund
- ☐ As the Executive Director sees fit at the time Handbell Musicians of America receives the gift
- ☐ Designated to the following fund(s): \_\_\_\_\_

**I (we) understand that upon joining the Legacy Society, I (we) will receive the following benefits:**

- My (our) name will be listed on the Guild's legacy wall recognizing donors who have made planned gifts to the organization.
- I (we) will be recognized in an annual listing in the Guild's publications as a planned gift donor to the organization. ☐ Check here to remain anonymous in publications.
- I (we) will be invited to an annual Legacy Society recognition event hosted by the Board of Directors and Executive Director.

**I (we) understand that Handbell Musicians of America may periodically ask me (us) to update this information for financial recordkeeping purposes.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Please return your completed form to the national office:**

Handbell Musicians of America  
1055 E. Centerville Station Road  
Dayton, OH 45459  
1-800-878-5459 (toll free) or (937) 438-0085 Fax: (937) 438-0434