The Okoboji Foundation Legacy Society recognizes those caring individuals who have included us in their will or estate plans. Honorary membership in the Legacy Society is our way of expressing our deep gratitude for joining us to create your personal lakes legacy.

If you have included the Okoboji Foundation in your will or estate plans, please let us know so we may thank you!

**Legacy Society Membership Confirmation:**
I/We confirm that I/we have taken steps to make a planned gift to benefit the Okoboji Foundation.

NAME(S) ___________________________________________________________
ADDRESS ____________________________________________________________
CITY ________________________________     STATE _________     ZIP ___________
PHONE ___________________________   EMAIL_____________________________

Please Sign: ________________________________     Date

**NOTE:** This indicates only the intent to make a gift. This is not a binding document. If you need additional information about or assistance with making a planned gift to the Okoboji Foundation, please contact Rob Waterhouse at 712.332.7177.

**Public Acknowledgement of Membership in the Legacy Society**
Please check one of the following:

☑️ Yes, I/WE would like my/our name(s) listed in foundation publications as part of the Okoboji Foundation Legacy Society. Please list my/our name(s) as follows:
___________________________________________________________________

☐ No, I/WE would not like my/our name(s) listed in foundation publications as part of the Okoboji Foundation Legacy Society. My/our gift should be listed anonymously.

Please provide contact information for your Attorney:
Attorney’s Name ______________________________________________________
Attorney’s Phone ___________________________   Attorney’s Email ______________________
Attorney’s Address ______________________________________________________
City/State/Zip ______________________________________________________

The Okoboji Foundation is an affiliate of the Community Foundation of Greater Des Moines, an Iowa nonprofit located at 1915 Grand Ave., Des Moines, Iowa. This form is for general purposes only and is not intended as legal or financial advice. The Okoboji Foundation recommends that each person considering a planned gift consult with her or his own legal or financial advisor.
Details of Legacy Society Membership:

Please answer the following questions to the extent to which you feel comfortable. It is often helpful to have a record of pertinent details of your plans to ensure that your wishes are carried out. Please provide details below or attach them separately. (*It is very helpful to attach a copy of the page or section from your will containing the bequest for our files.) If you are comfortable providing approximate amounts of your provision or percent of your estate, please do so. This document is confidential.

1. I have made the following provision(s) for my estate plan to include the Okoboji Foundation:

   - [ ] **Bequest in my will**

   - [ ] **Charitable Trust** arrangement with Okoboji Foundation as beneficiary

   - [ ] **Charitable Gift Annuity** with Okoboji Foundation as beneficiary

   - [ ] **Retirement Account** with Okoboji Foundation as beneficiary

   - [ ] **Other (please explain)**

2. As the community foundation for the Iowa Great Lakes area, does the Okoboji Foundation have an area that is of special interest to you?

3. How did you learn about the Okoboji Foundation Legacy Society? (Please check all that apply)

   - [ ] Attorney (Name)
   - [ ] Family/Friends (Name)
   - [ ] Financial Advisor (Name)
   - [ ] Okoboji Foundation publication, event or publicity
   - [ ] Okoboji Foundation staff or board member (Name)
   - [ ] Other, please explain

4. Is there any other information you would like to share?

Please return to: Okoboji Foundation  
P. O. Box 593  
Okoboji, IA 51355  
Phone 712.332.7177  
Email info@okobojifoundation.org  
Website www.okobojifoundation.org