



Juneau Legacy Challenge

Bequest Intention Form

Thank you for investing in the future of our community through the Juneau Community Foundation. This Bequest Intention Form is **non-binding, confidential, and helps us plan for our communities' long-term needs.**

Donor Information

Name(s): _____

Phones(s): _____ Email(s): _____

Gift Information

It is my/our intention to provide for the future of Juneau with a gift through (please check any that apply):

☐ Bequest (Will/Trust) ☐ Life Insurance ☐ Retirement Plan Beneficiary (IRA/401k) ☐ Other

Estimate of Future Gift

Estimate Future Gift Value: \$ _____

Gifts over \$25,000 are eligible to qualify for Juneau Legacy Challenge grant recommendations.

Endowed Field of Interest Fund Designation

Your future gift will be placed into a permanent endowment. Please select your preferred areas of impact and provide the % of your gift that is to go to each area selected. Total must equal 100%.

____ % Arts & Culture

____ % Trades and Vocational Training

____ % Youth & Education

____ % Women & Children

____ % Parks, Trails & Recreation

____ % Senior Services

____ % Community Wellness Endowment

____ % Other Endowment*: _____

****May not be eligible for 5% matching grant fund incentive***

My Juneau Legacy Challenge Grant Recommendation:

I recommend the Foundation consider a one-time immediate grant of \$ _____ (5% of estimate, up to \$20,000) from the Foundation's Juneau Legacy Challenge incentive pool to the following local 501(c)(3) organization(s):

☐ Please list my 5% grant as recommended by: _____

☐ Please donate my 5% grant anonymously

Legacy Partner Society

☐ Public listing: List my name in publications as: _____

☐ Anonymous : Do not publish my name.

Donor Signature: _____ Date: _____

Incentive Grant Terms: Legacy Challenge Grant recommendations are subject to approval by the Foundation's Board of Directors and must be made to eligible 501(c)(3) nonprofits in Juneau or Southeast Alaska. Grants are distributed from a separate Legacy Challenge Fund at the Foundation. The Legacy Challenge Grants do not reduce the value of your estate gift. A minimum pledge of \$25,000 is required to qualify. Please return form to Juneau Community Foundation. Disclaimer: We advise consulting a financial or tax advisor regarding the tax efficiencies of your specific gift.



Juneau Legacy Challenge

The Juneau Legacy Challenge is a Southeast Alaska community-wide matching campaign by the Juneau Community Foundation to build \$20 million in permanent endowment funds. These "forever funds" ensure our communities have the resources to meet changing needs for generations to come.

We're thrilled to offer you an opportunity to see the impact of your philanthropy today through the Juneau Legacy Challenge. By simply documenting and sharing your future estate plans now, you can unlock immediate funding for our community's current needs through the Challenge with no out-of-pocket cost to you.

The Power of your Promise: How the Immediate Grant Works

This incentive program applies exclusively to gifts directed to our permanent endowed Field of Interest Funds, which support broad community causes rather than a specific, agency or donor advised fund. Here's exactly how it works:

1. *Pick Your Giving Options:* You can participate in this Challenge by giving in one or both of the following ways before June 30, 2028:
 - a. Make a Bequest Commitment of \$25,000 or more; *or*
 - b. Outline a Multi-Year Pledge of \$100,000 or more today using cash, appreciated stock, or IRA Qualified Charitable Distributions (QCDs)
2. *Document Your Plan:* Name the Foundation in your estate plans for \$25,000 or more for an eventual contribution to a permanent Field of Interest Fund or make a current pledge for \$100,000 or more.
3. *Submit Your Form(s):* Complete our single-page, confidential **Bequest Intention Form** providing a conservative, good-faith estimate of your future gift's value in today's dollars. *Or* document your immediate outright contribution with a **Multi-Year Donation Pledge Form**.
4. *Activate the Match:* The Foundation calculates 5% of your estimate and immediately sends a check for that amount (up to a \$20,000 per household) to the qualified Juneau or Southeast Alaska nonprofits of your choice.

Commitments to Our Donors

Donations such as these depend on trust—your trust in us and our trust in you. The following outline our commitment to you:

- Your legacy remains intact: The immediate 5% grant is paid from a separate \$1 million matching pool. It does not reduce your future estate gift.
- We ensure **total privacy**: Confidentiality is important to us. We operate entirely on trust. We do not require copies of your will, trust, or financial statements, and the form(s) you provide remain confidential between you and the Executive and Operations Directors.
- Future legacy gifts are non-binding: We understand that life and financial situations may change. The **Bequest Intention Form** is a statement of intent that creates no legal liabilities for you or your heirs. Lifetime gifts, outlined in the **Multi-Year Donation Pledge Form** are expected to be fulfilled before the June 2031 deadline.

Why Permanent Endowments Matter

Permanent endowments protect the future of our community by keeping your original gift intact forever while using only the investment earnings to fund annual grants. To qualify for this challenge, grant recipients are selected by a volunteer community committee rather than the donor alone. This structure guarantees that your gift will continuously adapt to support Juneau and Southeast Alaska's most urgent needs long after we are gone.

Ready to activate your match?

We look forward to speaking with you about this opportunity. Contact the Juneau Community Foundation today for more information: 907-523-5450 or amy@juneaucf.org.

Disclaimer: We advise consulting a financial or tax advisor regarding the tax efficiencies of your specific gift.