December 14, 2021

To: TSIC Board Members

From: Laurey T. Stryker, Fundraising Chair

Subject: Plans for Annual Mission Makers Legacy Circle

Background:

The Board adopted plans for Mission Maker Legacy Circle in 2018. The goals were to:

* Assure future Manatee students have Take Stock opportunity
* Maximize the 100% state scholarship match with planned gifts so more students benefit
* Celebrate legacy donors during their lifetime
* Inspire others to consider TSIC as part of their community legacy

We adopted gift policies and investment policies. These policies are important as donors consider us as stewards of their estate giving.

The requirements for the Mission Maker Legacy Circle include:

* Complete an Intent form (in our Board documents)
* It’s Circle member’s choice to share specific plans
* We don’t ask about the amount
* It’s revocable
* The member chooses whether we can use their name to inspire others – we do not post this list on our website

Annual Mission Maker Legacy Circle Luncheon:

Annually, we bring together Mission Maker Legacy Circle members, supporters and those interested in considering including Manatee TSIC in their legacy planning. We have 13 members and have a goal of increasing to 20.

This would be our third event. Last year it was virtual. This year we are planning in person but offering a zoom option. The date is February 8, Manatee Community Foundation – 11:30-1:30 p.m. There is no charge for the event as I will be underwriting it.

Help needed from the Board:

* Attend the luncheon
* Invite others you think would be interested – include CPAs and Estate Attorneys who may be interested for their clients
* Consider becoming a Mission Maker Legacy Circle Member