

**Arlington Chamber Foundation Legacy Endowment**  
**Preliminary Qualification Questions**

The Foundation has developed a series of questions for interested members to answer in determining if they qualify to take advantage of innovative Legacy Foundation Endowments.

Simply complete the questions below. If you qualify, contact the Foundation to schedule a preliminary meeting with you, your financial advisor and the Foundation’s Endowment Professional.

1. Do you own any of the assets listed below? Check all that apply:

- Stocks
- Bonds
- Raw Land
- Rental Property
- Commercial Property
- A Business

If you checked one or more boxes, you may be an ideal candidate. Please continue to answer the remaining questions.

2. Are you interested in obtaining tax advantages?

- Yes
- No

If you answered “yes” please continue.

3. Please check the areas below that interest you:

- More money for retirement
- More money for my heirs
- More money for community projects

If you check the “More Money” boxes, you may find value in the Foundation Legacy Endowment Program.

4. Please check the priorities / concerns that are important to you.

<input type="checkbox"/> Taxation of Highly Appreciated Assets	<input type="checkbox"/> Exit Strategy for Investments
<input type="checkbox"/> Exit Strategy for Real Estate	<input type="checkbox"/> Business Succession Planning Strategies
<input type="checkbox"/> Exit Strategy for Sale of a Business	<input type="checkbox"/> Education Expenses
<input type="checkbox"/> Retirement Plan Alternative	<input type="checkbox"/> IRA Strategies
<input type="checkbox"/> Charitable Planning	<input type="checkbox"/> Other

Would you like to set up a consultation with the Foundation Endowment Professional?

- YES                       NO

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_