



Chestnut Hill Conservancy—Confidential Planned Gift Intention Form

Please complete and return this form if you have already made provisions for a gift in support of the Conservancy. If you have not made a gift but would like more information on giving options, please contact the Development Coordinator.

Planned gift donors have the option to become named or anonymous members of the Chestnut Legacy Society, the Conservancy's recognition group for legacy donors.

I am willing to be recognized as a Chestnut Legacy Society member

I prefer to remain anonymous for this gift

Please list name as: _____

Name(s): _____

Address: _____

City, State, Zip: _____

Email: _____ Phone: _____

Type of Planned Gift: The following information is helpful to the Conservancy for planning purposes. Please check all that apply and estimate the value of each gift in today's dollars. If you have named the Conservancy as a percentage beneficiary, please indicate the dollar value of the Conservancy's percentage so that we can recognize you for your generosity.

Will: \$ _____

Insurance Policy: \$ _____

Revocable Living Trust: \$ _____

Real Estate (describe below): \$ _____

Charitable Remainder Trust: \$ _____

Other Asset (describe below): \$ _____

Retirement Plan/IRA: \$ _____

Is this gift to the Conservancy contingent on another beneficiary surviving you? No Yes

Additional Information: _____

The Chestnut Hill Conservancy wishes to assure you that this statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs, or your estate. Further, the Conservancy understands that the size of your future gift may be significantly different from the amount estimated above.

Signature: _____

Date: _____