



# Confidential Planned Gift Notification Form

*Thank you for your commitment to the future of our wild things and wild places*

The information you provide is not legally binding, and we understand that you may wish to change your gift in the future. Please contact Susan Houston at 214.720.1478 or shouston@tpwf.org with any questions.

## Contact Information

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email(s): \_\_\_\_\_

## Secondary Contact Information *(attorney, financial advisor, executor, next of kin)*

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

Address: \_\_\_\_\_

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

## About Your Gift

### *Gift in Will or Living Trust*

- Cash    Securities    Real estate    Personal property    Residuary    Contingent\*

*\*A contingent gift comes to TPWF only if the other named beneficiaries do not survive you.*

### *Beneficiary Designation*

- Insurance policy    Retirement Plan/IRA    Certificate of deposit, bank or brokerage account

Name of administrator or institution holding policy or account: \_\_\_\_\_

Other type of asset: \_\_\_\_\_

*Optional:* Approx. value of future gift \$ \_\_\_\_\_ or \_\_\_\_\_% of residuary estate

## I/We wish this gift to benefit

- Area of greatest need.  
 Specific purpose: \_\_\_\_\_

## Gift Recognition

- I/We wish to be recognized as member(s) of the John Graves Legacy Society.  
Please list my/our name(s) as: \_\_\_\_\_  
 I/We prefer this gift to remain anonymous.

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_