



Planned Gift Intention Form

Yes! I/We have included the Leelanau Conservancy in my/our estate plans.

Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Estimated Planned Gift Value: _____

When realized, the planned gift will support:

Greatest Needs Specific Purpose*: _____

**The Leelanau Conservancy Board of Directors will redirect restricted donations to a similar purpose if the original intent is no longer possible to achieve.*

The Leelanau Conservancy's Richard O. Ristine Heritage Society, named for a Conservancy planned-giving hero, recognizes those who have included the Leelanau Conservancy in their estate plans.

Members are invited to a special program every year.

May we include you in this important group?

Yes, I/we will become members of the Richard O. Ristine Heritage Society. I/We would like to be listed as follows:

Please list "Anonymous" if you would like to be a member, but not named as such in lists or publications.

No, do not include me/us in the Heritage Society.

I understand that this information does not constitute a legal obligation, and completing this form is solely to assist the Leelanau Conservancy. I understand that all information will remain confidential.

Signature: _____

Date: _____

Signature: _____

Date: _____

Additional Optional Information

The following information can help the Leelanau Conservancy better understand and honor your planned gift intentions and plan for the future.

The Leelanau Conservancy would be grateful to receive any of the following:

- A copy of relevant pages from your will, trust, or other document
- A note about any contingencies
- Contact information for your executor, trustee, or anyone else the Leelanau Conservancy should know about to honor your intentions:

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Your Birth Date(s): _____

Please indicate the type of planned gift you have made:

- Bequest in a will or trust
 - Life Insurance Policy
 - Retirement Plan
 - Other: _____
-

Comments:

Thank you!

The Leelanau Conservancy is a 501(c)(3) non-profit corporation. All donations are tax deductible to the extent allowable by law. As always, please consult your financial advisor for personal advice.

Leelanau Conservancy
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