

CONFIDENTIAL
STATEMENT OF INTENTION for ESTATE-BASED GIFTS

Estate-based giving is critical to the continuing vitality and success of Lemon Bay Conservancy. We deeply appreciate your intention to include the Conservancy in your long-term philanthropic plans and ask you to complete this document for two reasons: first, so that we may appropriately recognize your philanthropy; second, to create a record that will ensure that your contributions are used in the manner that you desire. This form is not a legally enforceable commitment.

Name: _____

Address: _____

Phone: _____ E-mail: _____

TYPE OF PROVISION

I have made provisions for Lemon Bay Conservancy (LBC) in my estate plans for one or more of the following:

	<i>Estimated Present Value</i>
_____ % of residue of estate	\$ _____
Outright bequest in my will	\$ _____
Contingent bequest if spouse or other heir predeceases me	\$ _____
Bequest in my spouse's will if I predecease my spouse	\$ _____
Life insurance policy with LBC as beneficiary	\$ _____
Trust arrangement with the LBC as a beneficiary;	\$ _____
The LBC is a beneficiary of my retirement plan	\$ _____
Donor advised fund residuum	\$ _____

PURPOSE

(Please indicate the designated use of gift.)

\$ _____ or _____% for the Conservancy to expend as determined by the sitting Board of Directors.

\$ _____ or _____% for the specific purposes of:

_____ By initializing on the foregoing line, I give permission to Lemon Bay Conservancy to publicly recognize my gift intention.

Date

Signature

The Conservancy recognizes members and friends who have contributed to the future of this land trust through documented bequests, gift annuities, trusts, and other gifts.

If you have questions about your gift plans or the information requested on this form, please contact us at 941-830-8922 or lbconservancy@comcast.net.