



Island Heritage Trust's Heritage Society

Membership Form

CONFIDENTIAL CONFIRMATION

The Heritage Society has been established to recognize the extraordinary commitment of people who include Island Heritage Trust in their estate plans. Members of this Society will be honored annually with a special summer event and, with permission, in our various publications.

In the spirit of encouraging others to follow your example, Island Heritage Trust would like to publish your name alongside other members of the Heritage Society. The information you provide on this form will help Island Heritage Trust with planning for a future. All details you provide on this form will remain *confidential* and are *not legally binding*. You may opt out of having your name published or made public by checking the box marked anonymous below. Island Heritage Trust is very grateful for your investment and for the impact it will have on the Trust's sustainability and future work.

Name(s): _____

Address: _____ State: _____ Zip: _____

Preferred Phone: () - Email: _____

Please choose one of the following:

- I understand that listing me among the members of the Heritage Society may be an incentive for others to give and I am willing to be publicly acknowledged.*
- I wish to join the Heritage Society, however I wish for my name and gift to remain anonymous.*

I am pleased to join the Heritage Society based on the following (check all that apply):

- Bequest *Listing Amount is Optional*
 - Specific bequest of a dollar amount \$ _____
 - Percentage bequest (estimated dollar amount) \$ _____
 - Residuary bequest (estimated dollar amount) \$ _____
 - Contingent bequest (estimated dollar amount in contingency) \$ _____
- Life Insurance (amount) \$ _____
- Retirement assets (estimated dollar amount) \$ _____
- Other estate gift (please specify) (estimated dollar amount):
_____ \$ _____

This gift to IHT will come into effect:

- At my death After the death of: _____
Relationship: _____ Date of Birth: ____/____/____

The gift(s) to IHT in my estate planning document is (are):

- Unrestricted
 Designated for the following purpose(s)**

I understand that I am not making a legal, or binding, commitment upon my estate by submitting this Heritage Society Membership Form. Further, Island Heritage Trust should understand that the size of my future gift may be significantly different from the amount estimated above (if listed). If, for any reason in the future, Island Heritage Trust is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the planned giving society.

Signature _____ Date _____

Thank you for your investment in Island Heritage Trust. For more information or questions, please contact Jacob McCarty, Development Associate, at jmccarty@islandheritagetrust.org or Julia Zell, Executive Director, at jzell@islandheritagetrust.org or by calling IHT's office at 207.348.2455.

** If you are considering restricting your gift for a specific purpose, please contact IHT in advance to discuss how your future intentions can be best planned and realized.