



Tell Us About Your Gift

Thank you for your generous bequest commitment to the Truckee Donner Land Trust. Your legacy gift will help us plan for the future as we work to conserve open space in the northern Sierra and create access for the public to enjoy – forever. Please complete the information below so we can better understand your intentions for your gift. It is useful, but not mandatory, for the Land Trust to receive a copy of the relevant section(s) of your plan.

Questions? Contact Danielle Williams, Director of Philanthropy at (530) 410-0962 or email danielle@tdlandtrust.org.

ABOUT YOU

NAME(S): _____

YEAR(S) OF BIRTH: _____

ADDRESS: _____

PHONE(S): _____

EMAIL(S): _____

ABOUT YOUR GIFT

The Truckee Donner Land Trust is named as a beneficiary of the following assets (check all boxes that apply).

If you are comfortable sharing the information, please include the current estimated value of the asset(s) in today's dollars:

INSURANCE POLICY: \$ _____ CHARITABLE REMAINDER TRUST: \$ _____

REAL ESTATE: \$ _____ RETIREMENT PLAN/IRA: \$ _____

WILL: \$ _____ OTHER ASSET(S): \$ _____

REVOCABLE LIVING TRUST: \$ _____ \$ _____

Please note that many financial institutions/firms do not contact beneficiaries when the account holder is deceased. Therefore, if you designate the Truckee Donner Land Trust as a beneficiary of any account not covered by your will, please notify us. Your help informing us of your designation will ensure the Land Trust is able to claim the assets when the time comes.

YOUR GIFT DESIGNATION

The Truckee Donner Land Trust uses charitable gifts to support its general mission unless otherwise specified by the donor. The more narrowly you restrict the use of your bequest, the greater the risk that the work or project you want to benefit today won't be as vital or as relevant when we receive your gift in the future. We look forward to discussing what impact you'd like to make through your gift.

You can indicate that your gift be used for the Land Trust's most critical priorities or for a specific area or program that matters to you (such as land acquisition or stewardship). Would you like your gift to be used for a specific purpose? YES NO

If you checked yes, please tell us how to direct your gift: _____

ADDITIONAL INFORMATION

A contingent gift comes to the Truckee Donner Land Trust only if the other named beneficiaries do not survive you.

Is your gift contingent? YES NO

If you checked yes, please explain: _____



FOREVER STEWARDS SOCIETY

Sharing your estate gift intention to support the Land Trust – at any level – means you are now a member of the Forever Stewards Society, the Land Trust’s legacy society. As a Forever Steward, you will be invited to exclusive hikes or special events, and recognized in our annual listing and other publications.

Please indicate your recognition preference by checking one of the following:

I/ We would like to be listed as (a) Forever Steward(s), which may include listing my/our gift within a dollar range.

Please list my/our name(s) as: _____

I/We prefer that my/our gift not be listed within a dollar range, but you may list my/our name(s) as (a) Forever Steward(s).

Please list my/our name(s) as: _____

I/We wish to remain anonymous for this gift.

SIGNATURE(S)

PRINTED NAMES

DATE

The information you provide is not legally binding, and we understand that you may wish to change your gift in the future.

**PLEASE RETURN THIS FORM TO TRUCKEE DONNER LAND TRUST:
P.O. BOX 8816, TRUCKEE, CA 96162 or EMAIL IT TO DANIELLE@TDLANDTRUST.ORG**

Thank you for your continued support for the Truckee Donner Land Trust and for sharing your plans with us. We do track (anonymously) the total number of intended estate gifts and this information helps us attract additional donors. By notifying the Land Trust of your gift you are helping to leverage even more future support for open space in the Sierra that all can enjoy – for nature, for people, forever. Thank you!

The Truckee Donner Land Trust cannot provide tax or legal advice. The material presented in this form is intended as a general outline of the giving vehicles available to you and should not be interpreted as legal, financial or tax advice – or an exhaustive list of options. Please seek the specific advice of your tax advisor, attorney, and/or financial planner to discuss your unique situation.

TRUCKEE DONNER LAND TRUST

PROTECT AND ENJOY

P.O. Box 8816, Truckee, CA 96162 • (530) 582-4711 • info@tdlandtrust.org • truckeedonnerlandtrust.org • Tax I.D. #68-0245327