



Confidential Legacy Intention Form

Welcome to the Legacy Society of the Appalachian Trail Conservancy (ATC)—our way of recognizing friends like you who are providing for the future of the Appalachian Trail.

Your support of our mission to protect, manage, and advocate for the Appalachian National Scenic Trail will ensure it lasts another 100 years—and beyond!

Legacy gifts from generous supporters have been a vital source of funding for the ATC. Membership in the Legacy Society involves no dues or obligations. It simply allows us to thank and recognize you for your intended gift and helps us plan for our financial future to carry out our mission.

NAME(S)

DATE OF BIRTH (MM/DD/YYYY)

STREET

APT

CITY

STATE

ZIP

PHONE

E-MAIL

PREFERRED METHOD OF CONTACT: PHONE E-MAIL

Your gift may inspire others to give. We hope you are willing to be acknowledged in ATC publications with other members of the Legacy Society. How would you like to be listed?

PLEASE LIST MY / OUR NAME AS: _____

THE GIFT IS IN HONOR OF: _____

IN MEMORY OF: _____

WE PREFER TO REMAIN ANONYMOUS.

SAMPLE LANGUAGE:

I bequeath _____ (dollar amount or % of estate) to the Appalachian Trail Conservancy, Inc., a nonprofit organization, with its principal business address at PO Box 807, Harpers Ferry, WV 25425. EIN/Tax ID: 52-6046689



Additional Information About Your Gift

Details about your gift help the ATC plan for its future, even for amounts that may change over time. Your information is confidential and is for our records only. This form is not legally binding upon you or your estate as to the ultimate receipt or value of any future gift.

I / We have included a donation to the Appalachian Trail Conservancy in my/our estate plan:

In the amount of \$ _____

or _____ % of my estate, which is currently valued at \$ _____.

Type of Gift

Check all that apply:

- GIFT FROM MY WILL OR LIVING TRUST
- RETIREMENT PLAN / IRA BENEFICIARY
- DONOR ADVISED FUND BENEFICIARY LIFE
- INSURANCE BENEFICIARY
- BENEFICIARY OTHER MANAGED ACCTS
- CHARITABLE REMAINDER UNITRUST BENEFICIARY
- REAL ESTATE

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

Is your gift contingent? NO YES (PLEASE EXPLAIN BELOW)

The Appalachian Trail Conservancy wishes to assure you that your statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs, or your estate. Further, the ATC understands that the size of your future gift may be different from the amount estimated above.

SIGNATURE(S)

DATE

