

Planned Gift Intention Form

Thank you for sharing your intention to make a planned gift to Maine Coast Heritage Trust (MCHT). Your future gift will help us bring the benefits of conservation to Maine's coastal communities for generations to come.

I/we have made the following gift(s) to Maine Coast Heritage Trust in my (my/our) estate plans.

Section 1: Legacy Circle Commitment

Gift Type:

- ☐ Will or Living Trust
- ☐ Life Insurance Policy
- ☐ Retirement account(s)
- ☐ Financial or investment account(s)
- ☐ Charitable Trust
- ☐ Prefer not to disclose how I/we have made our planned gift

My/Our gift is stated as:

- A specific dollar amount \$_____
- A Percentage of my/our estate %_____ (currently this would result in a gift value of \$_____)
- A percentage of my/our financial account %_____ (currently this would result in a gift value of \$_____)
- A gift of the following property (currently this property is valued at \$_____)

Maine Coast Heritage Trust will receive this planned gift:

- ☐ Upon my death ☐ Upon the death of my surviving spouse/partner
- ☐ Other_____

I am providing the name and contact information of my attorney for reference:

☐ I/we prefer to be anonymous.

☐ I/we wish to be recognized as: _____

Section 2: Gift Designation

MCHT may direct this future gift toward:

- ☐ Unrestricted: Please use this legacy gift where most needed in accordance with MCHT's mission.
- ☐ Restricted: I/we would like to direct this legacy gift to reflect specific conservation interests. Please contact me/us to discuss my/our intentions.

Section 3: Donor Contact Information

Name(s) _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone Number(s) _____

Preferred method(s) of contact: ☐ Phone ☐ Email ☐ Mail

Donor Signature _____ Date _____

Donor Signature _____ Date _____

*Maine Coast Heritage Trust understands that your plans or financial circumstances may change and does not make financial commitments in anticipation of any future estate gifts. This form is **NOT** a legally binding agreement. All information you provide will remain confidential.*

Maine Coast Heritage Trust Tax ID 23-7099105



**Maine Coast
Heritage Trust**

Jennifer Mathews, Planned & Leadership Giving Officer

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