



GIFT PLANNING
DECLARATION OF FUTURE INTENT
 WWW.ECOCENTER.ORG/GIVE

Thank you for your intention to include the Ecology Center in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Recognition of Your Gift

- For recognition purposes, please list my/our name(s) as follows:

- Please do not include my/our name in any public listings of donors.
- I/We wish for my/our gift intention to be confidential and anonymous, publicly and in Ecology Center records.
- Gift Agreement/Letter** – I/We have signed a Gift or Letter Agreement with the Ecology Center for this gift and have made no changes to the designation or purpose.
- No Gift Agreement/Letter** – Briefly describe allocation, designation, and how your gift should be used. _____

Description and Value of Gift – Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for the Ecology Center:

<u>Description</u>	<u>Amount or Percentage</u>	<u>Estimated Amount of Gift to the Ecology Center</u>
<input type="checkbox"/> Will or Trust with a sum of	_____	_____
<input type="checkbox"/> Remainder of Retirement Fund/IRA with a total current value of	_____	_____
<input type="checkbox"/> Life Insurance Policy with a policy value at maturity of	_____	_____
<input type="checkbox"/> Other Item or Asset in the amount of	_____	_____
Please describe (for example, private collections, real estate, securities, etc.):		

- Beneficiary** – If the Ecology Center is only a contingent beneficiary, please explain conditions.

- Documentation** – Please provide us with copies of any documents (or the relevant pages) that include provisions for the Ecology Center.

Please Complete Reverse Side

Contact Information

Will or Trust – If your gift is included in a will or trust, please provide the following:

Executor(s) or Trustee(s)

Name and Address

Phone and/or Email

Beneficiary Designation – If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or Email

Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.)

Name and Address

Phone and/or Email and Relationship

This Declaration of Intent enrolls you in the The Julia Morris and Ann Hubbell Society. You will be contacted regarding your participation.

- New Intention** – This is a new bequest intention to the Ecology Center.
- Update to Intention** – This is an update to a previously recorded bequest intention to the Ecology Center.

Signature Date

Signature Date

Print Name

Print Name

Street Address

Street Address

City, State, Zip

City, State, Zip

Email and Phone Number

Email and Phone Number

Please send this form (together with copies of any relevant documents) to the Ecology Center. Please contact Julia Madden at 734.369.9269 if you have any questions or concerns.

The Ecology Center
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734.761.3186