

Legacy Gift Intent Form

Donor(s) Name

Mailing Address

City

State

Zip

In order for us to properly follow up with you, please provide as many as apply:

Home Phone

Mobile Phone

Email

Your name(s) will appear as a member of the Heritage Society unless you wish to remain anonymous.

Preferred Heritage Society Listing Name(s)

I/We wish to remain anonymous.

I/We have included the National Academies in my/our estate plan as follows:

Non-Contingent Bequest in Will or Revocable Living Trust

Current Estimated Value

Beneficiary Designation: Retirement Plan

Current Estimated Value

Beneficiary Designation: Donor Advised Fund

Current Estimated Value

Beneficiary Designation: Life Insurance Policy

Current Estimated Value

Charitable Gift Annuity

Current Estimated Value

Charitable Remainder Trust

Current Estimated Value

Charitable Lead Trust

Current Estimated Value

Other

Current Estimated Value

My/Our gift is for the unrestricted use of:

NAS

NAE

NAM

My/Our gift is designated for:

Additional information about my gift:

I/We understand that our gift (with the exception of a charitable gift annuity) is revocable and not binding upon my/our estate.

Name

Date

Name

Date