



WALLOON
LAKE
ASSOCIATION AND
CONSERVANCY

Legacy Society Planned Giving Statement of Intent Form

This statement is an expression of my intent to provide for the future of Walloon Lake Association and Conservancy (EIN 38-3606004) through a planned or estate gift. The provision(s) made include the following:

- An outright bequest upon the passing of the donor, or the passing of the donor and spouse.
- A life insurance policy, in which Walloon Lake Association and Conservancy is named as beneficiary or owner and beneficiary.
- Retirement assets, in which Walloon Lake Association and Conservancy is named as a beneficiary.
- A trust agreement, with income reserved for the donor, spouse, or other income beneficiary.
- Other (please specify) _____

The estimated value of my (our) gift is \$ _____

Purpose

It is my wish that the gift be used:

- At Walloon Lake Association and Conservancy's discretion, to create the greatest impact in our community by supporting its most compelling needs and opportunities.
- For another fund or purpose: please contact Jon Breithaupt, WLAC Executive Director, via phone: 231-535-6112 ext. 120 or email: jon@walloon.org to discuss options

Special circumstances of my gift include: _____

Recognition

The Walloon Lake Association and Conservancy greatly appreciates the opportunity to acknowledge your commitment to protecting Walloon Lake by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

- I (we) permit Walloon Lake Association and Conservancy to use my/our name(s) in printed lists of planned gifts, which may appear in Walloon Lake Association and Conservancy newsletter, website and/or other publications.
- I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.
- I (we) prefer to remain anonymous during and after my/our lifetime(s).

Donor Signature

Date

Printed Name:

Address:

City:

State:

Zip Code:

Phone: (H)

(C)

Email:

Date of Birth:

Spouse's Signature

Date

Printed Name:

Address:

City:

State:

Zip Code:

Phone: (H)

(C)

Email:

Date of Birth:

Thank you for your commitment to Walloon Lake Association and Conservancy, our conservation community, and your investment in its future. If you have any questions, please contact, Jon Breithaupt, WLAC Executive Director, at 231-535-6112 ext. 120 or jon@walloon.org.

*Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.

Please forward this form to Jon Breithaupt, WLAC Executive Director, via email: jon@walloon.org or mail to Walloon Lake Association and Conservancy at PO Box 579, Walloon Lake, MI 49796. Thank you!