



WALLOON LAKE
ASSOCIATION AND CONSERVANCY

Planned Giving Statement of Intent

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 other fund(s) or purpose: Please call 231.535.6112 or email: haley@walloon.org to discuss with Walloon Lake Association.

Special circumstances of my gift include:

Recognition*

Walloon Lake Association and Conservancy appreciates the opportunity to acknowledge your commitment to the community 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, web site 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) _____

(W) _____

(C) _____

email: _____

Date of Birth: _____

Spouse's Signature

Date

Printed Name: _____

Address: _____

City: _____

State: _____

Zip Code: _____

Phone: (H) _____

(W) _____

(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 our Executive Director Haley Breniser at 231.535.6112 or haley@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 haley@walloon.org or mail to Walloon Lake Association and Conservancy at 4060 M-75, Ste #102 Walloon Lake, MI 49796.