



Planned Giving Declaration of Intent

Thank you for naming the Civil War Trust in your Estate Plans. This document is intended to give you the opportunity to provide us with additional details of your legacy gift. The information you provide here will ensure that we have accurate records so that we can provide the best possible stewardship of your gift. This is not a binding legal document, and your information will be kept confidential.

Date of estate plan or designation _____

Description of Gift (please indicate the type of gift including: bequests, trusts, life insurance or retirement account beneficiary designation or others)

Is this gift revocable (can be changed) or irrevocable (cannot be changed)

Is this a percentage Y/N _____% or a specific dollar amount Y/N? (*optional*)

Current estimated value of portion designated for the CWT (please provide your best estimate) (*optional*)

Gift Designation, if any (please indicate if you would like to target your gift for a specific purpose, and what you would like it to be used for). *Please note that certain restrictions can be difficult because of the availability of battlefield land for purchase; we are happy to work with you to determine if your designation can be realized.*

The Honor Guard is our recognition society for those who have named the Civil War Trust in their Estate Plans. By listing your name as part of this group in our publications, we hope that others will be inspired to follow in your footsteps. Please indicate if you would like to be listed as part of the Honor Guard, or if you prefer to remain anonymous.

____ Yes, please list my/our name(s) as part of the Honor Guard

____ No, please do not list my/our name(s), I/we prefer to remain anonymous.

Name(s) _____

Signature _____

Address _____

If possible, please provide us with a copy of the related section of your will, trust agreement, or other document containing provisions of your legacy gift (*this too is optional*). Thank you again.