



**rails-to-trails**  
conservancy

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## HERITAGE CIRCLE MEMBERSHIP ENROLLMENT FORM

Because of my commitment to the mission and work of Rails-to-Trails Conservancy, I, \_\_\_\_\_, confirm that I have taken the necessary steps to make a bequest or other planned gift to Rails-to-Trails Conservancy. To help Rails-to-Trails Conservancy make its vision of a nationwide network of trails and greenways a reality, and to encourage others to make this type of gift, I am proud to be recognized as a member of the Heritage Circle.

NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
TELEPHONE \_\_\_\_\_ FAX \_\_\_\_\_ E-MAIL \_\_\_\_\_

I have made or intend to make the following type of planned gift to Rails-to-Trails Conservancy:

### GIFT THROUGH WILL OR LIVING REVOCABLE TRUST

- Bequest of specific property or amount
- Bequest of residue of estate
- Bequest of percentage of estate
- Bequest to a Charitable Remainder Unitrust to provide income to a survivor and then to Rails-to-Trails Conservancy
- Bequest to a Charitable Lead Trust to provide income for Rails-to-Trails Conservancy and to protect my property for my children, grandchildren and others

### GIFTS THAT PROVIDE LIFE INCOME

- Unitrust
- Annuity Trust

### GIFT OF RETIREMENT ACCOUNT ASSETS

### LIFE INSURANCE POLICY

- New Policy
- Old policy

### OTHER \_\_\_\_\_

The estimated value of the above bequest or planned gift is \_\_\_\_\_  
(PLEASE NOTE: The information you provide will be held in strict confidence, and will be used for internal planning purposes only.)

With my intent to make a planned gift or bequest to Rails-to-Trails Conservancy:

- Please recognize me as a member of the Heritage Circle, with the opportunity to take advantage of special benefits accorded to Heritage Circle members only. I (and/or my spouse) would like to be recognized in Rails-to-Trails Conservancy publications in the following manner: \_\_\_\_\_ OR
- Please do not include my name in the list of Heritage Circle members in any Rails-to-Trails Conservancy publications.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE