



Bequest Intention Documentation and Support

Thank you for your intention to include the Emerald Necklace Conservancy (the Conservancy) in your estate plan.

In order to accurately document your bequest intention, please send the following documents to the Development Office:

- A completed Bequest Intention Letter (see page two).
- The portion of your will, trust, or other testamentary instrument that references the Conservancy and includes the document's signature page and date of execution.
- A copy of the beneficiary designation form for a bequest made via your retirement plan and/or life insurance policy that lists the Conservancy as a primary beneficiary.
- Any other relevant documentation (or pages) that include provisions for the Conservancy.
- Your name.

All information regarding your bequest intention will remain confidential.

Please note that the Bequest Intention does not create a binding obligation on your estate and has no effect other than ensuring that, when the future gift is made, the funds will be used as you intend.

On behalf of the Conservancy community, thank you for your visionary support.

[YOUR MAILING INFORMATION AND CONTACT DETAILS HERE]



Bequest Intention

I/we wish to have my/our intention to include the Emerald Necklace Conservancy (the Conservancy) in my/our estate plan recognized by the Conservancy. For these reasons, I am/we are providing the Conservancy with the following estimate and information regarding the ultimate purpose of my/our bequest(s).

The ultimate purpose for my/our bequest(s) will be for the Conservancy's general purposes or for core needs (such as restoration and protection, visitor experience and engagement, community volunteer experience, park system enhancement, education, programs, and other core needs as defined by the Conservancy from time to time). Ultimate purpose:

I/we estimate that my/our total bequest, at the time of distribution to the Conservancy (that is, at my death/the death of the survivor of my spouse and I), will have a value of approximately \$_____.

At present, I/we anticipate that the assets transferred to the Conservancy at my/our passing will be made through one or more of the following estate plan vehicles (please check all that apply):

- Will, Trust, Retirement Plan, Life Insurance Policy(ies)
- Other (please describe) _____

The contact information for my/our estate planning attorney, executor(s), and/or Trustee(s) is as follows:
Name, Relationship, Address, Phone, and/or Email:

The contact information for the Plan Administrator or Company for my/our Retirement Plans and/or Life Insurance Policy is as follows:
Name, Address, Phone, and/or Email:

Signature: _____
Date: _____

Print Name: _____

Address: _____

Phone Number: _____

Email: _____

Signature: _____
Date: _____

Print Name: _____

Address: _____

Phone Number: _____

Email: _____