

Heritage Circle

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: _____ Email: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Fax: _____

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
- Other

GIFTS OF RETIREMENT ACCOUNT ASSETS

LIFE INSURANCE POLICY

- New Policy
- Old Policy

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