

PLANNED GIVING



Leaving a lasting legacy today.

Thank you for your commitment to the continuation of Bur Oak Land Trust's mission to advance biodiversity in eastern Iowa by protecting resilient landscapes and connecting people to nature.

Completion of this form is non-binding and does not constitute a legal agreement. Rather, this document ensures that your gift intent will be honored appropriately and that both parties have an accurate record of your wishes.

YOUR INFORMATION

Name (self) : _____
First, Middle, Last

Spouse/partner (if applicable) : _____
First, Middle, Last

Date of Birth (self) : Date of Birth (spouse/partner) :
D D M M Y Y D D M M Y Y

Full Address : _____

City / State : _____ Zip code : _____

Phone (self) : _____ Phone (spouse/partner) : _____

E-Mail (self) : _____

E-Mail (spouse/partner) : _____

INTENDED TYPE OF PLANNED GIFT

- | | |
|---|--|
| <input type="checkbox"/> Bequest/Will | <input type="checkbox"/> Charitable Remainder Trust/Unitrust |
| <input type="checkbox"/> Trust | <input type="checkbox"/> Life Insurance |
| <input type="checkbox"/> IRA or Retirement Fund Plans | <input type="checkbox"/> Real Estate/Property/Land |
| <input type="checkbox"/> Other (please indicate) | _____ |

Anticipated approximate value of my/our gift: \$ _____
(And/or total percentage of estate: _____%)

Please note: We recognize that there may be uncertainty in estimating the total value of your gift. We ask that you consider assigning a general value so that we can ensure our record keeping reflects your generosity and better analyze the long-term financial health of the Foundation.

YOUR LEGACY AT WORK

- % Highest priorities of the Trust
- % General Operating (contribution to all Trust activities)
- % Other (please indicate): _____

■ ABOUT YOUR INSPIRATION

Please tell us about your connection to Bur Oak Land Trust and what inspired this gift (feel free to attach or send a separate write-up).

■ PERMISSIONS AND DOCUMENTATION

To show our gratitude and inspire others to follow in your footsteps, we would like to include your name(s) on our website.

Please list my/our name(s) as:

Or I/we prefer remain anonymous:

■ SIGNATURE(S)

Signature (self)

Date

Signature (spouse/partner, if applicable)

Date

■ QUESTIONS AND MAILING ADDRESS FOR COMPLETED FORMS

Bur Oak Land Trust
Attn: Ashlee Hopkins
5 Sturgis Corner Dr.
Ste. 1250
Iowa City, IA 52246

319-338-7030
ashlee@buroaklandtrust.org
www.buroaklandtrust.org

Federal Tax ID # 42-1104058

