



## Planned Giving Statement of Intent

This statement is an expression of my intent to provide for the future of Conservation Foundation of the Gulf Coast (EIN 20-0345249) through a planned or estate gift. The provision(s) made include the following:

- An outright bequest upon the passing of the donor, or the passing of the donor and spouse.
- A life insurance policy, in which Conservation Foundation of the Gulf Coast is named as beneficiary or owner and beneficiary.
- Retirement assets, in which Conservation Foundation of the Gulf Coast is named as a beneficiary.
- A trust agreement, with income reserved for the donor, spouse, or other income beneficiary.
- Other (please specify) \_\_\_\_\_

The estimated value of my (our) gift is \$\_\_\_\_\_.

## Purpose

It is my wish that the gift be used:

- At Conservation Foundation of the Gulf Coast's discretion, to create the greatest impact in our community by supporting its most compelling needs and opportunities.
- For other fund(s) or purpose: Please call 941.918.2100 to discuss with Conservation Foundation's Director of Philanthropy Lee Ann Rodriguez.

Special circumstances of my gift include:

## Recognition\*

Conservation Foundation of the Gulf Coast appreciates the opportunity to acknowledge your commitment to the community by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

\_\_\_\_\_ I (we) permit Conservation Foundation of the Gulf Coast to use my/our name(s) in printed lists of planned gifts, which may appear in Conservation Foundation's newsletter, web site and/or other publications.

\_\_\_\_\_ I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.

\_\_\_\_\_ I (we) prefer to remain anonymous during and after my/our lifetime(s).

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<i>Donor Signature</i>		<i>Date</i>
Printed Name: _____		
Address: _____		
City: _____	State: _____	Zip Code: _____
Phone: (H) _____	(W) _____	(C) _____
email: _____		
Date of Birth: _____		

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<i>Spouse's Signature</i>		<i>Date</i>
Printed Name: _____		
Address: _____		
City: _____	State: _____	Zip Code: _____
Phone: (H) _____	(W) _____	(C) _____
email: _____		
Date of Birth: _____		

Thank you for your commitment to Conservation Foundation of the Gulf Coast, our conservation community, and your investment in its future. If you have any questions, please contact our Director of Philanthropy Lee Ann Rodriguez at 941.918.2100 or [leeann@conservationfoundation.com](mailto:leeann@conservationfoundation.com).

*\*Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.*

Please forward this form to [leeann@conservationfoundation.com](mailto:leeann@conservationfoundation.com) or mail to Conservation Foundation of the Gulf Coast at PO Box 902, Osprey, FL 34229-0902.