



Preservation Society Planned Gift Notification

Name(s) Please Print _____		Spouse Name (If Applicable) _____	
Address _____			
City _____		State _____	Zip _____
Phone Number _____		E-mail Address _____	
Date of Birth _____		Spouse's Date of Birth (If Applicable) _____	

We hereby inform you that we have made a provision for a gift in my/our estate plans. We understand that this commitment is revocable and can be modified by us at any time.

It is our intent to leave a legacy gift to Lula Lake Land Trust through our: _____

Contact Name (Trustee/Executor/Company): _____

Contact information (Address/Phone): _____

We wish to inform you for long-term purposes only that, as of this date, the value of our gift is \$_____ or _____% of my residuary estate (estimated value of estate \$_____)*
(If your gift is a percentage of your estate, please indicate the approximate value of that percentage.)

Our gift is to be in support of: _____

We agree to have our names published on lists of legacy donors as a means to motivate others to leave a future gift to benefit Lula Lake Land Trust. **(Note: The amount of our gift is not published and remains confidential).**

If you agree, please list your names as you would like them in print:

If you would prefer to remain anonymous, please write "ANON" here: _____

DONOR SIGNATURE: _____ **DATE:** _____

SPOUSE SIGNATURE: _____ **DATE:** _____

We understand that, by stating an amount, our estate is not legally bound by this statement and we may choose to add, subtract, or revoke this planned gift at any time, at our sole discretion. Lula Lake Land Trust kindly requests notification any time you make changes or adjustments to your gift. With this gift, we have joined Lula Lake Land Trust's Preservation Society.

Thank you for keeping Lula Lake Land Trust in your future plans! If you have any questions, please call or email Cody Roney, Executive Director, at 706-820-0520 | cody@lulalake.org.

Please return form or send inquiries to:
Cody Roney, Executive Director
Lula Lake Land Trust
PO Box 395
Lookout Mountain, TN 37350
706-820-0520 | cody@lulalake.org