



Lula Lake Land Trust Preservation Society Form

Please complete and return this form to become a member of Lula Lake Land Trust's Preservation Society. **ALL INFORMATION IS STRICTLY CONFIDENTIAL.**

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) _____	

TYPE OF ESTATE GIFT:

Bequest

Description and approximate value of bequest:

- \$ _____
- _____% of my residuary estate (current estimated value of estate \$ _____)
- Please circle: One-Life Two-Life Other _____
- Real estate _____
- Testamentary trust _____
- Other _____

IRA or Retirement Plan Asset \$ _____

Life Insurance \$ _____

Other _____ \$ _____

Charitable Remainder Trust \$ _____

Contact Name (Trustee/Executor/Company): _____

Contact Information (Address/Phone): _____

MY GIFT IS TO BE IN SUPPORT OF:

- Unrestricted
- Endowment, unrestricted
- Endowment, restricted to: _____
- I have enclosed a copy of the relevant section of my will or other documentation and/or a personal letter from me describing my estate gift to Lula Lake Land Trust.
- Please list me as a member of Lula Lake Land Trust's Preservation Society.

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**

Signature