

# Tell Us About Your Legacy Gift



GROUNDSWELL  
CONSERVANCY

Thank you for your generous commitment to Groundswell Conservancy. To better understand your intentions for this gift, we ask that you please complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding, and we understand that you may wish to change your gift in the future.

## Your Contact Information

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone H  C  W  \_\_\_\_\_

Email\* \_\_\_\_\_

\* You will receive occasional email updates from Groundswell. We do not sell, rent or exchange your email address.



## About Your Gift

If you are willing to disclose information about your gift, please check all that apply.

Yes! I/We have named Groundswell Conservancy as a beneficiary in my/our will or estate plans, in the following way:

- Will  Trust  IRA or Retirement Plan Assets  Charitable Remainder Trust  
 Life Insurance Policy  Charitable Gift Annuity  Other:

The approximate value of my gift is \$ \_\_\_\_\_ or \_\_\_\_\_ % of my estate or residue.

(Optional)

## Your Gift Will Support:

\_\_\_\_\_ % Highest priorities of Groundswell Conservancy (Unrestricted)

\_\_\_\_\_ % Restricted to \_\_\_\_\_

## Acknowledging Your Gift

I/We understand that this future gift makes me/us a member of Groundswell Conservancy's Legacy Circle, and the membership list may be published in the Conservancy's publications and website.

- Groundswell may publicly acknowledge my/our gift. Please list my/our names as:

\_\_\_\_\_

- Anonymous  If anonymous, you may publicly recognize my/our gift once it is realized.

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

Please return completed form to: Groundswell Conservancy | 211 S. Paterson St., Suite 250 | Madison, WI 53703 or amy@groundswellconservancy.org

**Sample language to include a planned gift as part of your will:**

I/we give \_\_\_\_\_% of my residual estate – OR – the sum of \$\_\_\_\_\_ to Groundswell Conservancy, Inc., a Wisconsin nonprofit, nonstock corporation that is recognized as exempt from taxation under Section 501(c)(3) of the Internal Revenue Code of 1986 (as amended) with principal offices located in Madison, Wisconsin (or successor organization), to be used for its general charitable purposes.

**Your attorney or estate planner will need our legal name and address:**

Groundswell Conservancy, Inc., 211 S. Paterson St., Suite 250, Madison, WI 53703  
Our Federal Tax ID Number is 39-1452825.

Please return completed and signed form to:

**Groundswell Conservancy**

211 S. Paterson St., Suite 250

Madison, WI 53703

or via email to: amy@groundswellconservancy.org

Please contact Amy Mertz with any questions or comments at (608) 258-9797 or amy@groundswellconservancy.org