Tell Us About Your Legacy Gift

GROUNDSWELL CONSERVANCY

LEGACY CIRCLE

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 170 | 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:
Groundwell Conservancy, Inc., 211 S. Paterson St., Suite 170, Madison, WI 53703
Our Federal Tax ID Number is 39-1452825.

Please return completed and signed form to:

Groundwell Conservancy
211 S. Paterson St., Suite 170
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