

The National Academies of
SCIENCES • ENGINEERING • MEDICINE

Legacy Gift Intent Form

Donor(s) Name

Mailing Address

City State Zip

In order for us to properly follow up with you, please provide one of the following:

Home Phone Mobile Phone Email

Your name will appear as a member of the Heritage Society unless you wish to remain anonymous.

Preferred Heritage Society Listing

I wish to remain anonymous.

I/We have included the National Academies in my/our estate plan as follows:

Non-Contingent Bequest in Will or Revocable Living Trust Current Estimated Value

Beneficiary Designation: Retirement Plan Current Estimated Value

Beneficiary Designation: Life Insurance Policy Current Estimated Value

Beneficiary Designation: Donor Advised Fund Current Estimated Value

Charitable Gift Annuity Current Estimated Value

Charitable Remainder Trust Current Estimated Value

Charitable Lead Trust Current Estimated Value

Other Current Estimated Value

My gift is for the unrestricted use of: NAS NAE NAM

My gift is designated for:

Additional information about my gift:

I/We understand that our gift is revocable and not binding upon my/our estate.

Signature

Date