



Confidential Planned Gift Notification Form

Thank you for your commitment to the future of our wild things and wild places

The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Please contact Merrill Chester Gregg at 214.720.1478 or mgregg@tpwf.org with any questions.

Contact Information

Name(s): _____

Address: _____

Telephone: _____ Email(s): _____

Secondary Contact Information *(attorney, financial advisor, executor, next of kin)*

Name: _____

Address: _____

Telephone: _____ Email: _____

About Your Gift

Gift in Will or Living Trust

- Cash Securities Real estate Personal property Residuary Contingent*

**A contingent gift comes to TPWF only if the other named beneficiaries do not survive you.*

Beneficiary Designation

- Insurance policy Retirement Plan/IRA Certificate of deposit, bank or brokerage account

Name of administrator or institution holding policy or account: _____

Other type of asset: _____

Optional: Approx. value of future gift \$ _____ or _____ % of residuary estate

I/We wish this gift to benefit

- Area of greatest need.
 Specific purpose: _____

Gift Recognition

- I/We wish to be recognized as member(s) of the John Graves Legacy Society.
Please list my/our name(s) as: _____
 I/We prefer this gift to remain anonymous.

Signature(s): _____ Date: _____