

Finger Lakes Trail Conference Estate Gift Notification Form

Thank you for sharing your estate gift intentions with the Finger Lakes Trail Conference (FLTC). This form allows us to recognize and honor you appropriately, ensure your intentions are implemented, and inspire others to consider planned giving. All information shared will be kept strictly confidential.

DONOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Birthday (MM/DD/YYYY): _____ Spouse Birthday (MM/DD/YYYY): _____

TRUSTEE OR EXECUTOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

GIFT INFORMATION

Finger Lakes Trail Conference is pleased to recognize its donors in our annual report and other publications. Please indicate your preference:

- ☐ Please list my/our name(s) as: _____
- ☐ I/We wish to remain anonymous.

To inspire others, we occasionally profile donors by sharing their story.

- ☐ I/We would be honored to be profiled in a future Finger Lakes Trail Conference publication. Please contact me/us.
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BEQUEST INFORMATION

Finger Lakes Trail Conference is named as a beneficiary of (check all that apply):

- ☐ Sections of my will or trust
- ☐ Retirement Account/Plan*
- ☐ Life Insurance Policy
- ☐ Qualified Charitable Distribution
- ☐ Investment or Financial Account*
- ☐ Other asset (please specify): _____

(Optional) Current estimated value of gift(s): \$ _____

Note: Many financial firms do not contact beneficiaries when account holders pass away. Executors must notify REF for such gifts to be realized.

SIGNATURES

This form is non-binding.

Signature: _____ **Date:** _____

Signature: _____ **Date:** _____

RETURN INFORMATION

Please return this form to:

Finger Lakes Trail Conference

6111 Visitor Center Rd
Mt. Morris, NY 14510

Phone: (585) 658-9320

Email: fltc.treasurer@fingerlakestrail.org