



# Legacy Giving Intention Form

I/We wish to be recognized with membership in the John Muir Legacy Society to ensure the continued preservation and stewardship of natural areas in the East Bay.

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

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

*All information indicated below is considered confidential and is only used to track current and potential legacy and planned gifts to John Muir Land Trust:*

**Yes** You have my/our permission to include my/our name(s) in published lists (publications, newsletters & website) recognizing John Muir Legacy Society members.

**No** I/we wish to remain anonymous.

Please list my/our name(s) for the John Muir Legacy Society in the following manner.

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

I/We have provided for the future of John Muir Land Trust in the following manner:

Bequest through will or trust

Gift of real estate

Gift of life insurance

Other: \_\_\_\_\_

Beneficiary of retirement plan assets

Please find attached a copy of the page or paragraph from the will or trust bequest, beneficiary designation form for life insurance, beneficiary designation for retirement plan, or other gift plan that describes my gift provision.

The estimated current dollar value of my gift is \$ \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

We are honored to know that you have included John Muir Land Trust in your estate plans.

Please send the completed form to: John Muir Land Trust, P.O. Box 31, Martinez CA 94553 or email to Kathleen Stavis at [kathleen@jmlt.org](mailto:kathleen@jmlt.org).

Thank you for your generous and meaningful commitment to East Bay land conservation.

For more information please contact Kathleen Stavis, Associate Director, Major and Legacy Giving at [kathleen@jmlt.org](mailto:kathleen@jmlt.org) or 925-293-4807



# Here's How the Legacy Match Challenge Works

The Legacy Match Challenge is a campaign to inspire our supporters to let us know about legacy commitments that in return **help raise funds that JMLT can use today!**

**Through the Legacy Match Challenge, you can maximize the impact of your future estate plans.**

## **STEP 1:**

Name John Muir Land Trust in your will or trust, or as a beneficiary of your retirement, insurance, or other financial account. New commitments and upgraded previously established legacy plans qualify.

## **STEP 2:**

Complete the Legacy Giving Intention form included on the opposite side of this page and return it to our office. Or complete the form on our website at [jmlt.org](http://jmlt.org) and email it to [kathleen@jmlt.org](mailto:kathleen@jmlt.org).

## **STEP 3:**

A group of our Board of Directors who have provided a matching gift pool will make a gift of \$1,000 right now to JMLT in your honor. It is just that easy to support JMLT now through your future legacy gift intention.

What Gifts Qualify:

- Bequest from a will or trust (\$, %, or remainder)
- Beneficiary of life insurance, investment, 401(k), IRA, other retirement, and checking or savings accounts

**Your legacy gift will save more land today and far into the future. Thank you!**

For more information please contact Kathleen Stavis, Associate Director, Major and Legacy Giving at [kathleen@jmlt.org](mailto:kathleen@jmlt.org) or 925-293-4807