



Confidential Gift Plan Information

Indication of Planned Gift

I have made provisions for a gift to Truckee Tahoe Community Foundation in my estate plan:

- | | Estimated Current Value: |
|---|--------------------------|
| <input type="checkbox"/> Will | \$ _____ |
| <input type="checkbox"/> Beneficiary of life insurance policy | \$ _____ |
| <input type="checkbox"/> Beneficiary of IRA or other deferred account | \$ _____ |

Beneficiary of a trust:

- | | |
|--|----------|
| <input type="checkbox"/> Revocable beneficiary | \$ _____ |
| <input type="checkbox"/> Irrevocable beneficiary | \$ _____ |
| <input type="checkbox"/> Gift Annuity | \$ _____ |
| <input type="checkbox"/> Other (please describe) | \$ _____ |

Truckee Tahoe Community Foundation Legacy Society keeps the details of your gift confidential, and you are welcome to decline public recognition. However, public recognition is encouraged to you may be an encouragement and inspiration to others:

- You may publish my name as a Legacy Society Member of Truckee Tahoe Community Foundation. My name should be listed as follows:

- Please do not publish my name as a member of the Legacy Society.

Name (s): _____

Address: _____

City _____ State _____ Zip _____

Phone: _____ Email: _____