



Bequest Information Form **C O N F I D E N T I A L**

Welcome to our Confluence Legacy Club - visionary supporters making lasting commitments! Thank you for planning ahead and including McKenzie River Trust (MRT) in your plans.

Please take the time to fill out this form so we can better understand and honor your intentions. The information you provide is not legally binding and we understand that you may change your plans. Questions? Please contact our office at 541-345-2799 or email info@mckenzie river.org.

Name(s): _____

Year(s) of Birth: _____

Address: _____

Phone: _____ Email: _____

Unless directed otherwise, you will receive occasional communications and invitations as a member of our Confluence Legacy Club. We will not sell, rent, or exchange your email address. Please share any specific directions or requests here:

About Your Gift

Please share as many details as you'd like to share with us, checking all that apply and providing a rough estimate of the value of each gift in today's dollars. We understand this will change.

- Will: \$ _____ Insurance Policy: \$ _____
- Revocable Living Trust: \$ _____ Real Estate: \$ _____
- Charitable Remainder Trust: \$ _____ Retirement Plan/IRA: \$ _____
- Other asset(s): \$ _____ \$ _____

Given the uncertainty of when your gift will be realized, we greatly appreciate unrestricted gifts so that it may be used for whatever priorities exist at that time. Would you like your gift to be used for a specific purpose? Yes No

If you checked yes, please tell us how to direct your gift:

Unless otherwise specified, McKenzie River Trust uses charitable gifts to support current organizational priorities.

Additional information

Is your gift contingent? Yes No If yes, please explain

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

How would you like to be recognized for your gift?

- I/We would like to be listed as (a) Legacy Club member(s), which may include listing my/our gift within a dollar range. Please list my/our name(s) as _____.
- I/We prefer that my/our gift not be listed within a dollar range, but you may list my/our name(s) as (a) Legacy Club member(s). Please list my/our name(s) as _____.
- I/We wish to remain anonymous for this gift.

Signature(s):

_____ Date: