



Beneficiary Designation Notice *

Fishtown Preservation Society invites you to become a member of the Will and Joan Larson Heritage Society, our recognition club for donors who have made a planned gift benefitting Fishtown. To become a member, you may fill out this form, or send us a copy of your planned gift. We value your future gift, and want to properly thank you and acknowledge your thoughtfulness!

- I understand that listing this gift in donor rolls may be an incentive for others to give, and I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.
- I prefer to remain anonymous and request no contact or acknowledgement regarding this gift.

I have designated Fishtown Preservation as a _____% beneficiary of my IRA or other retirement account. That account is invested with _____ and my future gift has a current *estimated value* of \$ _____.

I have designated a specific gift of \$ _____ for Fishtown Preservation from my IRA or other retirement account. That account is invested with _____.

I have designated Fishtown Preservation as a _____% beneficiary of my insurance policy. That policy is with _____ and my future gift has a current *estimated value* of \$ _____.

- My future gift is unrestricted.
- I direct Fishtown Preservation to use my bequest for a specific purpose. The specific purpose is as follows: _____
_____.

For recognition purposes, please list my/our name(s) as:

_____.

Signature: _____ Date: _____

Address: _____

Email: _____ Phone: _____

**** This is a confidential record. I understand that I am not making a legal or binding commitment upon my estate by submitting this Beneficiary Designation Notice. Further, Fishtown Preservation Society understands and acknowledges that the size of my future gift may be significantly different from the amount estimates above for the purposes of valuation.***

Return completed form to:
Fishtown Preservation Society, Attn: Amanda Holmes, P.O. Box 721, Leland, MI 49654