



A MARTHA'S VINEYARD LAND TRUST

Estate Planning

Statement of Intent

PERSONAL INFORMATION

Name of Donor(s)

Address

City State Zip

Phone Email Address

LEGACY (PLANNED) GIFT

I have made a provision in my estate planning to benefit Sheriff's Meadow Foundation (SMF). The provision is in the form of a:

- Bequest (Will or Trust)
- Retirement Fund Beneficiary Designation
- IRA
- Life Insurance
- Other:

Estimated Value of Estate Gift: \$ _____

My attorney and/or financial advisor is:

Name

Phone Email

PURPOSE

It is my wish that the gift be used:

- At SMF's discretion, to create the greatest impact

For the following existing fund or purpose:

- Land Acquisition
- Land Stewardship
- Organizational Endowment

*If you are considering a donation of land or other real property, we ask that you connect with SMF President, Adam Moore, to review the details of your intended plans, in order to align with SMF's Gift Acceptance Policies and Conservation Plan.

IN RECOGNITION OF YOU!

SMF appreciates the opportunity to acknowledge your commitment by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes. By notifying SMF of your future estate plans, you are also welcomed into the organization’s *Legacy Society*, and will receive invitations to Legacy Society events.

- I (we) permit SMF to use my/our names in printed lists of planned gifts, which may appear in SMF’s annual report, newsletter, web site and/or other publications.
- I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.
- I (we) prefer to remain anonymous during and after my/our lifetime(s).

Name(s) as you wish to be listed:

SAMPLE LANGUAGE FOR YOUR WILL OR TRUST

Please share this language with your estate attorney, financial planner, other professional advisor, and your administrator or executor:

*I give to Sheriff’s Meadow Foundation, a nonprofit 501(c)(3) organization headquartered in West Tisbury, MA
EIN 04-6111529 \$ (amount) or (percentage)*

I/we understand that, by stating an amount, this statement does not legally bind my/our estate, and that I/we may choose to add, subtract, or revoke this bequest, at any time at my/our sole discretion.

Donor Signature _____ Date _____

Donor Signature _____ Date _____

Thank you for your commitment to our Island community and your investment in its future!

Please return your form by email or mail to:

Adam Moore, President

Sheriff’s Meadow Foundation

PO Box 3000, PMB #3162

West Tisbury, MA 02575

508.693.5207

moore@sheriffsmeadow.org