

Notification Of A Planned Gift



GLEN LAKE ASSOCIATION

PO BOX 551

Glen Arbor, Michigan 49636

Dear GLA Development Committee,

Yes, I/We, _____, have established/ intend to establish (circle one) a Planned Gift with the Glen Lake Association as the/ a beneficiary. It is/ will be in the form of:

- A Will An IRA/ Retirement Plan
- An Insurance Policy Other (please specify) _____
- A Trust Arrangement

Note: If this is an irrevocable gift, you may be eligible for a tax write-off.

I/ We wish those assets from my/ our Estate Plan(s) that are directed to the Glen Lake Association be used for the following purpose(s):

- GLA General Fund (for ongoing operational expenses)
- Glen Lake Watershed Protection Fund (for non-recurring expenses)
- GLA Endowment Fund (for long-term financial stability)
- GLA Memoriam/ Honorarium

- I am/ we are enclosing a copy of the pertinent page(s) or section(s) of the legal gift document that specified Glen Lake Association.*
- Upon completion of my/ our Estate Plan, I/ we shall forward a copy of the pertinent page(s) or section(s) of the legal document to the Development Committee of the Glen Lake Association.*
- Glen Lake Association has been/ will be included in my/ our Estate Plan but I/ we prefer not to share a copy of the pertinent page(s) or section(s) of the legal gift document.*

Signature

Print name

Date

Signature

Print name

Date