



## Planned Giving Notification Form

*The Chattanooga State Foundation recognizes donors who make a planned (deferred) gift by welcoming them into our Legacy Circle, which will ensure that Chattanooga State's high achievement continues for generations to come.*

**Donor name(s):** \_\_\_\_\_

*Please list your name (s) as you wish it to appear in our records and donor recognition materials.*

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

☐ I/we wish to remain anonymous.

I/we are pleased to join the Legacy Circle with a planned gift to the Chattanooga State Foundation that was executed on (month/day/year): \_\_\_\_\_

### Description of planned gift

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Bequest under will           | <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Real Estate                  | <input type="checkbox"/> Life Insurance  | <input type="checkbox"/> Charitable Lead Trust      |
| <input type="checkbox"/> Other (describe here): _____ |  |   |

Please check one

- ☐ A specific amount: \_\_\_\_\_
- ☐ A percentage of Estate (estimated value: \$ \_\_\_\_\_)
- ☐ Remainder of Estate (estimated value: \$ \_\_\_\_\_)

If applicable, the purpose/designation of my/our gift: \_\_\_\_\_

*Optional: We welcome attachments that further describe this gift as well as copies of the section of wills, trust, insurance policy or other documents that mention the Chattanooga State Foundation.*

**Donor signatures(s):** \_\_\_\_\_

Please return completed Notification Form to: Nancy Patterson, Chattanooga State Foundation, 4501 Amnicola Highway, Chattanooga, TN 37406. For questions or additional information, please call 423-697-2630.