



**PRESBYTERIAN
HERITAGE CENTER**
MONTREAL

THE TRILLIUM CIRCLE

Estate Gift Confirmation Form

Thank you for your generous commitment to the Presbyterian Heritage Center and for letting us know that you have made Presbyterian Heritage Center a part of your legacy and estate plan. We are honored that our work reflects something you value enough to make this statement to future generations. We welcome you to The Trillium Circle and thank you for serving as an inspiration to others!

About Me / Us: I/We have named *Presbyterian Heritage Center* as a beneficiary of our estate as described below:

Donor 1

Name

Address

Phone

E-mail

Donor 2

Name

Address

Phone

E-mail

Gift Type: I/We have made a provision for *Presbyterian Heritage Center* through my/our:

☐ Will or Revocable Trust Agreement

☐ Life Insurance Policy or Annuity

☐ Beneficiary Designation

☐ Charitable Remainder Trust

☐ Retirement Account(s) – IRA,
401(k), 403(b) or 401(a).

☐ Donor Advised Fund

☐ Life Insurance Policy or Annuity

☐ Transfer on Death Deed

☐ Other: _____

Gift Use: My/our gift is to be deposited in the PHC Endowment Fund.

Executor / Personal Representative / Family Member:

(A helpful point-of-contact in the event of your passing.)

Name

Phone

E-mail

A Good Faith Estimate: (OPTIONAL)

The future value of my/our planned estate gift is approximately \$_____ or _____ % of my/our _____ (estate, trust or retirement account).

Wishes or Preferences:

☐ Toward greatest needs as determined by the *Presbyterian Heritage Center* Board of Directors (unrestricted).

☐ I / We would like for our legacy gift to be used as per our gift agreement on file with the *Presbyterian Heritage Center*.

Trillium Circle Membership: Please enroll me/us as members of the Trillium Circle as follows (select one):

☐ Feel free to list and publish my/our name(s) among the members as motivation for others to leave a future gift to benefit *Presbyterian Heritage Center*. I/we wish my/our name(s) to appear as follows:

☐ Do not publish my/our name(s) in the membership roster (list Anonymous”).

Signature, Donor 1

Date

Signature, Donor 2

Date

*Thank you again for sharing your plans with us. This form is **non-binding**. The Presbyterian Heritage Center recognizes that your priorities could change in the future. This expression of your current intent is greatly appreciated.*

Next Step: Please return this form and direct any questions or additional information to:

Executive Director
Presbyterian Heritage Center
PO Box 207
318 Georgia Terrace
Montreat, NC 28757