

CHATTANOOGA STATE FOUNDATION

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: Chattanooga State Foundation, 4501 Amnicola Highway, Chattanooga, TN 37406. For questions or additional information, please call 423-697-2630.