



1799 SOCIETY

HERITAGE FOUNDATION OF WILLIAMSON COUNTY, TN

CONFIDENTIAL

The Heritage Foundation of Williamson County established the **1799 Society** to recognize donors who further the Foundation's preservation mission through a commitment in their wills, a charitable trust, life income plan, life insurance, or other estate planning vehicle. The Society is named after the year Williamson County was created by the Tennessee General Assembly.

My/Our Information:

Name (print): _____ Spouse name (if joint gift): _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email Address: _____

Gift Information:

I/We have provided a gift to the Heritage Foundation as set forth in my/our:

- Will or Trust
- Charitable Gift Annuity
- Life Insurance Policy
- Charitable Remainder Unitrust
- Retirement Plan or Beneficiary Designation (401(k), 403(B), IRA, Keogh, Brokerage Account)
- Other Asset(s) (please describe): _____

The current estimated value of my/our gift is \$_____. My/Our gift is _____% of the asset indicated above. If a percentage is given, what is the current estimated value of the percent in today's dollars \$_____.

Gift Purpose:

Gift Agreement/Letter. I/We have signed a Gift Letter or Agreement with the Heritage Foundation of Williamson County stating the designation or purpose for this gift.

I/We have not signed a Gift Letter or Agreement. It is my/our intention that the Heritage Foundation of Williamson County use this future gift for the following (If multiple areas, please provide percentages or specific amounts):

Recognition:

Donors who provide a planned gift to benefit the Heritage Foundation of Williamson County will be enrolled in the 1799 Society.

I/we prefer no public recognition

Please list my/our name(s) as follows: _____

Estate Contact Information:

Although optional, the following information is very helpful: Executor, Trustee (if your gift is through a Will, Trust):

Name: _____ Address: _____

City, State: _____ Zip Code: _____ Phone: _____

Email: _____

Administrating Company (i.e., TIAA, Fidelity, etc., if your gift is through a retirement account or life insurance policy):

Name: _____ Address: _____

City, State: _____ Zip Code: _____ Phone: _____

Email: _____

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. The Heritage Foundation of Williamson County understands that the size of my/our future gift may change.

Signature: _____ Spouse Signature (if joint): _____

Date: _____



Please return this form to:
Heritage Foundation of Williamson County
c/o Development Department
112 Bridge Street, Franklin, TN 37064
Email: gmartin@williamsonheritage.org | Phone: (615) 591- 8500