



# 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](mailto:gmartin@williamsonheritage.org) | Phone: (615) 591- 8500**