



# Madison Preservation Legacy Circle Pledge Form

I/We am/are committed to leaving a legacy beyond my/our lifetime(s) by including the Madison Trust for Historic Preservation (Madison Trust) in my/our estate plans. I/We wish to support Madison Trust in its work of advocating, educating, and celebrating the rehabilitation, restoration, and preservation of historic places in the community that cultivate a civic identity and sense of place.

### Gift Type

*(While amounts are optional, they are very much appreciated as a way to help Madison Trust plan for its future)*

It is our intent to leave a legacy gift to Madison Trust through a:

- Will or Living Trust (percentage of estate \_\_\_\_\_% or specific amount \$\_\_\_\_\_)
- IRA or Retirement Plan Beneficiary (amount \$\_\_\_\_\_)
- CD or Savings Account Beneficiary (amount \$\_\_\_\_\_)
- Life Insurance Policy Beneficiary (amount \$\_\_\_\_\_)
- Charitable Remainder Trust Beneficiary (amount \$\_\_\_\_\_)
- Publicly-traded stock or other securities (amount \$\_\_\_\_\_)
- Donor Advised Fund (where \_\_\_\_\_) (amount \$\_\_\_\_\_)
- Other \_\_\_\_\_

It is especially helpful to have a copy of the portion of your Will, Trust or Beneficiary Designation form that pertains to your gift. In many cases, IRA and other plan administrators will not contact Madison Trust directly to inform us of your gift or to make a distribution of your assets after your lifetime. To ensure that we receive your intended gift, it is helpful for us to have this information on file.

Please check this box if you are attaching documentation for our files.

I/We understand that my/our estates are not legally bound by this statement and I/we may choose to add, subtract, or revoke this gift at any time at my/our sole discretion.

(Note: Madison Trust kindly requests notification any time you make changes or adjustments to your gift.)

(Continued)

