

*Planned Gift Formal Notice of Intent*

Montana Trout Unlimited (MTU) conserves, protects and restores Montana’s coldwater fisheries and their watersheds.

This document is a tool to ensure MTU staff and volunteers comply with your gift intentions, designate your planned gift as you wish, and recognize your generosity based on your preferences. This is neither a legal document nor a binding pledge. We understand this gift commitment is by intent only and may be modified or revoked.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I/We have provided for Montana Trout Unlimited in my/our estate plans in the following way:

* through a bequest in a will or living trust
* as a beneficiary of a life insurance policy
* as a beneficiary of a charitable remainder trust
* as a beneficiary of an IRA, 401k or other retirement plan
* other estate provisions naming Montana Trout Unlimited as the beneficiary: \_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Optional information) The estimated value of this gift is: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The intended use of this gift is:

* undesignated/general operating support
* other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Recognition:

* I/We would be pleased to be included in public recognition. The name(s) will appear as listed above. The *terms* of my gift will remain confidential.
* I/We prefer to remain anonymous.

Signature (s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

For assistance, please contact Kelley Willett at 406.543.0054 or Kelley@monanatu.org

Montana Trout Unlimited, P.O. Box 7186, Missoula, MT 59807

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