



PLANNED GIVING NOTIFICATION

I/We have made a provision in my/our estate plan for a gift to the Marine Corps Heritage Foundation. I am/We are pleased to share the details of my/our gift below. I/We understand that all information listed on this form will be kept in strict confidence, except to the extent I/we have requested recognition in the 1775 Society.

Name: _____ Date of birth: _____

Name: _____ Date of birth: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

I/WE HAVE ARRANGED THE FOLLOWING PLANNED GIFT(S) TO THE MCHF:

☐ Will ☐ Living Trust ☐ Retirement Plan ☐ Life Insurance Policy ☐ Charitable Remainder Trust

☐ Other: _____

ESTIMATED VALUE OF GIFT:

☐ _____ % of my/our will, currently valued at \$ _____ for the MCHF.

☐ _____ % of my/our living trust, currently valued at \$ _____ for the MCHF.

☐ _____ % of my/our retirement plan, currently valued at \$ _____ for the MCHF.

☐ _____ % of my life insurance policy, currently valued at \$ _____ for the MCHF.

☐ _____ % of my/our charitable remainder trust, currently valued at \$ _____ for the MCHF.

☐ OTHER: _____ % of my/our _____, currently valued at \$ _____ for the MCHF.

RECOGNITION:

☐ Please list me/us as member(s) of the 1775 Society as follows:

☐ I/We wish for this planned gift intention to be anonymous.

This commitment is revocable, and can be modified by me/us at any time.

Signature: _____ Date: _____

Signature: _____ Date: _____

Please return your completed form to: Office of Development, Marine Corps Heritage Foundation, 1775 Semper Fidelis Way, Triangle, VA 22172