



The Legacy Circle Letter of Intent

- ☐ **Yes! I have included the Vermont Historical Society in my estate plans.**

Name: _____ Date: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Type of gift:

- ☐ Will / Living Trust
☐ IRA / Retirement Account
☐ Bank, Brokerage, or Other Financial Account
☐ Charitable Trust
☐ Other (please specify): _____

My future gift:

- ☐ Is a percentage of my estate and is worth approximately: \$ _____
☐ Is in the specific amount of: \$ _____
☐ I wish to keep the value of my future gift confidential
☐ My future gift is designated to support:
☐ Where it is most needed at the discretion of VHS Executive Leadership
☐ The Endowment Fund
☐ Specific Program (please specify): _____

Donor Recognition choices:

- ☐ I/we wish to remain anonymous and do not want this gift acknowledged in public.
☐ I/we would like to be acknowledged as a member of the Legacy Circle with the following wording:

Name of Individual(s) or family name: _____

Signature: _____ Date: _____

Please return this form to Emily Lev, Director of Stewardship & Public Relations:

Vermont Historical Society

Attn: Legacy Circle
60 Washington Street, Ste. 1
Barre, VT 05641-4209