



Bequest Notification Form

I/we have named, the Open Land Trust as a beneficiary in my/our will or estate plans in the following way:

My/our future gift is from my:

- ☐ My/Our will or living trust
- ☐ My/our cash, bank, brokerage, donor advised fund or other financial account
- ☐ My/our Retirement or Insurance Policy
- ☐ Other

Name(s): _____

Address: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

I/we understand that this future gift makes me/us a member of the Open Land Trust's Bluff Legacy Circle and that the membership may be published in the organization's publications and website.

- ☐ Please list me/us as a Bluff Legacy Circle member in the following way:

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- ☐ I/we prefer to remain anonymous:

Estimated value of legacy gift (optional): _____

Your attorney will need our legal name and address:

Beaufort County Open Land Trust, Inc. P.O. Box 75 Beaufort, SC 29901

Our Federal Tax ID Number is: 23-7114992

Please return this completed form to:

Open Land Trust

P.O. Box 75

Beaufort, SC 29901

Feel free to contact Liz O'Brien

with any questions at

843-521-2175

liz@openlandtrust.org

**The information provided is not legally binding and we understand that you may wish to change your gift in the future.*