

PLANNED GIFT INTENT FORM

the National Mississippi River Museum & Aquarium

This form is to advise the Dubuque County Historical Society (DCHS), which operates the National Mississippi River Museum & Aquarium and the Mathias Ham Historic Site, of my philanthropic intent and will be held in the strictest confidence.

It is not binding.

NAME: _____

TELEPHONE: (____) _____

EMAIL: _____

ADDRESS: _____ CITY: _____ STATE: _____ ZIP: _____

YEAR OF BIRTH: _____



BEQUEST INFORMATION

- WILL RETIREMENT PLAN ASSETS LIFE INSURANCE POLICY/ANNUITIES OTHER
 TRUST UNDER MY WILL REVOCABLE TRUST QUALIFIED CHARITABLE DONATION (401K)

For DCHS's long-term planning purpose only, as of this date, the value of my anticipated bequest gift is \$_____ OR _____ % of my estate.

(Disclosure is greatly appreciated, but not required. If unsure of precise amount, please estimate. Any additional letters or copies of those sections of your will which further describe the nature of your provision are welcome.)

It is my/our wish that the estate gift be used as follows:

- AREA OF GREATEST NEED TO THE ORGANIZATION.
 DESIGNATED FOR THE FOLLOWING PURPOSE: _____

RECOGNITION

- YOU MAY PRINT MY/OUR NAME(S) IN LEGACY SOCIETY LISTINGS AS FOLLOWS.*

**If willing, please provide a quote and electronic image that we may add to our Legacy Society wall to inspire future generations of donors.*

- YOU MAY **NOT** PRINT MY/OUR NAME(S) IN LEGACY SOCIETY LISTINGS.

SIGNATURE: _____

Thank you for your support, which will inspire stewardship of our history and rivers for generations to come.

Please return this declaration to: Attn: Corrine Kroger, VP of Development & Marketing
Dubuque County Historical Society
350 East third Street
Dubuque, Iowa 52001