

PLANNED GIFT INTENT

Donor Name (s) as you would like it to appear:



or check this box if you'd like to remain anonymous.

It is my(our) intent to include Henry's Fork Foundation in my(our) estate plans using the following vehicle(s):

TRUST/WILL/BEQUEST

Sample language to share with your attorney to leave a bequest from your Trust or Will: "I give and devise to Henry's Fork Foundation, a Section 501(c)(3) organization, Ashton, Idaho, (all or stated percentage) of the rest, residue and remainder of my estate, both real and personal, to be held, administered, and used by the Board of Directors for the unrestricted support of the conservation and education programs of the Foundation. ... I instruct that all my charitable gifts shall be made, to the extent possible, from property constituting "income in respect of a decedent" as that term is defined in the Internal Revenue Code." Please provide detail on type of trust(s) used (i.e., irrevocable trust, Charitable Remainder Trust, Charitable Lead Trust, etc. _____

CHARITABLE GIFT ANNUITY

How it works: In exchange for a gift, Henry's Fork Foundation agrees by contract to pay a fixed amount each year to one or two beneficiaries (the annuitants) for life. The amount of the annuity payment will depend on the ages of the annuitants and the value of the assets donated. Henry's Fork Foundation offers the rates that are suggested by the American Council on Gift Annuities, a national organization. Upon establishing a charitable gift annuity, you are entitled to a current income tax deduction for a portion of the value of the assets given to fund the charitable gift annuity.

IRA, 401K, ANNUITY, OR OTHER RETIREMENT ACCOUNT ASSETS

How to leave a gift of Retirement Plan Assets: It's easy to give remaining retirement plan assets to Henry's Fork Foundation. It is an extremely effective strategy to reduce estate and/or income taxes. Here are some ways you can make a significant future gift to the Henry's Fork Foundation through your retirement plan (401k, 403b, IRA's): (i) Name Henry's Fork Foundation as a primary beneficiary of part or all remaining assets in your retirement plan at your death, (ii) Name Henry's Fork Foundation as a contingent beneficiary of the plan, (iii) Name Henry's Fork Foundation at the death of your surviving spouse. Simply request a change of beneficiary form from either your employer or the financial institution managing

your retirement plan(s). Make the necessary changes, return the form to your retirement plan manager and notify Henry's Fork Foundation of your intent.

LIFE INSURANCE POLICY

The benefits to gifting Life Insurance and How to do it: A gift of a life insurance policy often allows you to make a substantially larger charitable gift than would otherwise be possible. Charitable life insurance gifts generate tax deductions based on the premium payments and your estate remains undiminished in spite of making a substantial charitable gift. You may transfer the policy to Henry's Fork Foundation so that Henry's Fork Foundation becomes the owner and beneficiary. You may be entitled to an immediate charitable deduction for income tax purposes and, if you continue to pay premiums, each payment may also be a deductible donation.

Additional Comments:

If you are willing and it is appropriate, please include copies of any pages from your estate planning documents that include the Foundation so that we may verify the accuracy of the language and ensure that your gift is handled accurately. In addition, if you would like you can provide us an estimated amount of benefit that the Foundation is expected to receive here: \$ _____ (this information will be kept strictly confidential)

Signature(s):

I hereby declare my intent to include Henry's Fork Foundation in my estate plans with the vehicle(s) indicated above and authorize the Foundation to recognize my intent using the name(s) indicated above:

Donor Signature

Date

Joint Donor Signature

Date



Return Form

Please mail or email this form to:

Henry's Fork Foundation
Attn: Brady Taylor
PO Box 550
Ashton, ID 83420
legacy@henrysfork.org