

Estate Gift Notification Form

To formalize your endowment or other estate gift to benefit Humanities Montana, we simply need written documentation of your intention. It is useful, but not mandatory, for HM to receive a copy of the relevant section(s) of your will. Please feel free to include only the information that you are comfortable sharing. Your information will be kept strictly confidential and we will recognize your legacy gift only with your approval.

DONOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Birthday (Mo/Yr): _____ Spouse Birthday: _____

Telephone: _____

Email: _____

TRUSTEE OR EXECUTOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

Email: _____

HUMANITIES MONTANA LEGACY INFORMATION

Humanities Montana is pleased to recognize you in our annual report and other publications. Please indicate your recognition preference by checking one of the following:

☐

Please list my/our name(s) as: _____

☐

I/We wish to be anonymous.

One of the most effective ways of raising awareness about the importance of legacy gifts for Humanities Montana is to periodically profile our donors, sharing with others the story of why they support us.

☐

I/we would be honored to be profiled in a future Humanities Montana publication.
Please contact me/us.

BEQUEST INFORMATION

Humanities Montana is named as a beneficiary of (check all boxes that apply): (If willing to share the information, please include the current estimated value of the asset.)

- ☐ Sections of my will or trust _____
- ☐ Retirement Account/Plan* _____
- ☐ Life Insurance Policy _____
- ☐ Investment or Financial Account* _____
- ☐ Other asset* _____

**NOTE: Please note that many firms do not contact beneficiaries when the account holder is deceased. Therefore, if you designate Humanities Montana as a beneficiary of any account not covered by your will you must notify HM so we are aware of the designation and able to claim the assets when the time comes.*

DESIGNATION

- ☐ I request that funds be used to support critical HM needs.
- ☐ Additional information or directions regarding my bequest that Humanities Montana should be aware of: _____

Signature*: _____ **Date:** _____

Signature*: _____ **Date:** _____

**This form is non-binding.*

Thank you again for your continued support of our national parks and for sharing your plans with us. We do track (anonymously) the total number of intended estate gifts and this information helps us attract additional donors. By notifying the National Park Foundation about your gift you are helping to leverage even more support for the national parks.

Please return this form to:

*Jill Baker
Executive Director
311 Brantly
Missoula, MT 59801
Phone: (406) 243-6022
Email: jill.baker@humanitiesmontana.org*