

Tahoe Rim Trail Legacy Circle Enrollment Form



The Tahoe Rim Trail Legacy Circle honors and recognizes the generosity and vision of those who have chosen to leave a legacy gift to the Tahoe Rim Trail Association (TRTA) in their will or estate plan. Please complete the following form to let the Tahoe Rim Trail Association know your philanthropic goals related to the Association and join the Legacy Circle.

If you have any questions about this form or leaving a legacy gift to the Tahoe Rim Trail Association, please contact Veronica Palmer at 775-298-4490 or veronicap@tahoerimtrail.org.

I/We have made provisions for the Tahoe Rim Trail Association in my will/estate plan.

Please include any additional information you would like us to know now about your gift e.g. anticipated amount, type of gift, etc. (optional):

I/We have designated the gift for (please check one):

- Unrestricted (TRTA Annual Operations) TRTA Stewardship Fund (Board Restricted)
- TRTA Endowment (Permanently Restricted) Restricted Endowment for _____*

*Gifts over \$50K may be utilized to set up a separate restricted endowment for a specific program or project. The principle of this gift will be held in perpetuity and the earnings will support the donor's request. Unrestricted gifts of any amount may also be designated for a specific program but the principle will not be maintained.

I/We have made other deferred arrangements for the TRTA. Details:

- This gift is part of an individual will/estate plan** **OR** **This gift is part of a joint will/estate plan**

Name(s) _____

Mailing Address _____

City _____ State _____ Zip _____

Phone _____ E-Mail _____

- I/We wish to remain anonymous. Please do not list my name among Legacy Circle Members.**

Please sign and date this form for our records.

Signature

Date

Please return this form to:

Lindsey Schultz, Executive Director, Tahoe Rim Trail Association
PO Box 3267, Stateline, NV 89449