**Confidential - The Mountaineers Summit Society Intention Form**

The Mountaineers Summit Society honors members and friends who have decided to pass on their legacy to the future of outdoor education by remembering The Mountaineers in their estate plans. We hope you will consider joining other Summit Society members by leaving a legacy gift to The Mountaineers.

If you are already a Summit Society member, Thank you!

**The Mountaineers is a 501(c)(3) nonprofit organization.**

**Legal name:** The Mountaineers | **Federal Tax ID #:** 27-3009280

Located at 7700 Sand Point Way NE, Seattle, WA 98115

**Thank you for taking a few minutes to share the following information with us:**

**Contact information** (please print clearly)**:**

Name(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City \_\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_ Zip \_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Birthdate(s) \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ] I/We are **reconfirming** continued membership in The Mountaineers’ Summit Society

[ ] I/We qualify for **new** membership in The Mountaineers’ Summit Society

We are honored by those who value their experience with The Mountaineers so greatly that they choose to make a planned gift. However, sometimes we do not know of an individual’s generous intentions until they have passed. We understand that some people do not want public recognition and may want their gift to remain anonymous; we will always honor these wishes and ensure that information is kept confidential. We are also greatly gratified when we can thank a donor during their lifetime and speak with them about how they would like their gift to make a difference to The Mountaineers.

**Please let us know if we may recognize your generosity:**

[ ] I/We give permission to be recognized as a Summit Society member(s) as follows:

**Please note your preferred listing here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*If you choose to be publicly recognized, your gift may inspire others to also consider an estate gift.*

[ ] I/We prefer our Legacy Society membership to be anonymous

**Please indicate how you have provided for The Mountaineers in your financial and estate planning.**

[ ] A bequest in your will or living trust [ ] IRA or other retirement plan

[ ] A charitable remainder trust [ ] An insurance policy

[ ] A charitable lead trust [ ] Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**The intended use of this gift is to benefit The Mountaineers through**

[ ] Unrestricted support (highest priorities of The Mountaineers)

Gifts left to The Mountaineers Annual Fund is the most powerful type of gift as it provides flexibility and agility of funding to fulfill high-priority mission-driven initiatives of the organization at the time they are needed most.

[ ] Restricted support – as described below.

Current restricted funds include: ‘publishing’, ‘conservation’, ‘youth programs’, or ‘scholarships’ and these central funds support related activities across all branches. Donors may also direct gifts to Branches or Outdoor Centers. Please reach out for advice on restricted giving so we can make sure funds will be available in the way you intend.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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*We understand many gifts represent a percentage of an estate or an account that will change in value over time. Information provided is not considered in budgeting, however, your willingness to share the estimated value of your estate gift helps The Mountaineers plan for the future.*

The estimated value of my future gift is:

[ ] Up to $24,999 [ ] $250,000-499,999

[ ] $25,000-49,999 [ ] $500,000-999,999

[ ] $50,000-99,999 [ ] $1,000,000 or more

[ ] $100,000-249,000 Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your commitment to The Mountaineers future is so important and we would like to know more about you. Feel free to write beyond the space of these pages if you desire.

1. What is your favorite memory with The Mountaineers?
2. What impact has your Mountaineers experience had on you or your family?
3. Why did you decide to include The Mountaineers in your estate plans?

**Signature 1:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D**ate**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signature 2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D**ate**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We at The Mountaineers are grateful that you have provided this information to us.

Once completed send to Bri Vanderlinden via mail or email. Please know that this form is not a binding commitment upon your estate it is simply a tool to document donors wishes and provide footprints for future development staff.

If you have any questions or would like more information, please contact us.

**Brianne Vanderlinden, Associate Director of Development**

7700 Sand Point Way NE Seattle, WA 98115

Tel: (206) 521-6006 | email: [briv@mountaineers.org](mailto:briv@mountaineers.org)