



LEGACY CIRCLE

How to Be a Part of it All

Legacy Circle membership helps ensure the long-term health of Eagle Island, Inc., and the only requirement is to simply inform us that you are planning a gift from your estate to Eagle Island, Inc. You do not have to specify the gift, and there is no minimum gift. You may join in your name or remain an anonymous member. By joining, you help to encourage others to follow your example and leadership in providing for Eagle Island's future.

To qualify for membership you can do any of the following:

- Make a bequest to Eagle Island, Inc. through your will or trust
- Name Eagle Island, Inc. as the beneficiary of a retirement account, a donor advised fund, or a life insurance policy

And provide any of the following:

1. A signed letter stating specific intention
2. Complete the **Legacy Circle – Notice of Intent** Form
3. A copy of the provision in your will or trust describing the gift to Eagle Island, Inc.
4. Copy of the beneficiary designation in your Retirement fund or Life insurance policy naming Eagle Island, Inc. as beneficiary



EAGLE ISLAND, INC.

Where History Meets the Future

LEGACY CIRCLE

Confidential Non-binding Notification of Intent

I/we realize the importance of sustaining and enhancing the mission of Eagle Island, Inc. into the future. To this end, I/we would like to inform you that I/we have included Eagle Island, Inc. in my/our estate plan.

Name/s: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Birthdate: _____

Optional: as of this date, the approximate value of my/our gift is \$ _____

(If your gift is a percentage of your estate, please indicate the current dollar value of that percentage.)

Thank you for making this gift to Eagle Island, Inc. This gift entitles you to membership in the Legacy Circle. Please let us know if we may recognize your membership in the Circle:

Yes ___ How would you like to be listed? _____

I/We'd prefer to be anonymous: ___.

It will help us recognize your gift appropriately if you could indicate that your gift is by:

___ Will/Bequest ___ Trust

___ Retirement Plan Designation ___ Life Insurance

___ Real Estate

___ Other (please describe) _____

If you desire to designate your gift for a specific purpose, please contact us to ensure that your wishes are fulfilled.

Signature: _____ Date: _____

Signature: _____ Date: _____

This Notification of Intent is not a legal obligation by the donor to Eagle Island, Inc.
All information will be held in strict confidence.