

**ZOO NEW ENGLAND  
PLANNED GIFT INFORMATION FORM**

CONFIDENTIAL

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Name Name of Spouse

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Address

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City/State/Zip Telephone

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Date of Birthday

Yes, please enroll me in the Zoo Legacy Society! I have made a provision for Zoo New England in my estate plan as follows:

**ESTIMATED AMOUNT**

- I. Outright bequest in my will or trust to take effect at my death \$ \_\_\_\_\_
  - Specific dollar amount
  - Percentage of estate
  - Specific property (please describe)
  
- II. Provisions in my will or trust for Zoo New England \$ \_\_\_\_\_  
at the death of the survivor of my spouse and me
  - Specific dollar amount
  - Percentage of estate
  - Specific property (please describe)
  
- III. Charitable Trust \$ \_\_\_\_\_
  - Remainder Trust
  - Lead Trust
  
- IV. As beneficiary of a life insurance policy
- V. As beneficiary of retirement plan assets
- VI. Other \$ \_\_\_\_\_

Please use the space below for any additional information you would like to share with us about the specifics or designation of your gift.

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Thank you for your support. Attachments or letters that further describe the above provision(s) are encouraged. In particular, a copy of the section of your will, trust agreement, or other documents pertaining to Zoo New England is appreciated. Having this on file will help to fulfill your philanthropic wishes. Please note that all information provided is confidential.

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Signature Date