

## The Sycamore Circle: Legacy Intention Form

Established in 2026, the Sycamore Circle honors and recognizes donors like you who include the Columbia Land Conservancy in their wills, trusts, or other estate plans.



***This form is not legally binding and does not replace your will or trust. It simply helps us understand your intentions so that we may honor your wishes and recognize your generosity.***

Name of Donor 1: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Donor 2: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### DECLARATION OF INTENTION

I/We have included Columbia Land Conservancy (CLC) in my/our estate plans as described below and, with this declaration, authorize Columbia Land Conservancy to document my/our estate gift as a pledge and expectancy. Documentation allows CLC to recognize your generous and transformative commitment to its future. Your gift will be counted and celebrated as part of Common Ground: The Campaign to Conserve Columbia County.

### TYPE OF GIFT AND PROVISION

- ☐ Bequest in Will or Trust (e.g. specific amount, percentage, or remainder)
- ☐ Retirement Assets (IRA, 401K, 403b, etc.)
- ☐ Charitable Remainder Trust
- ☐ Charitable Lead Trust
- ☐ Life Insurance (Columbia Land Conservancy is named as owner and/ or beneficiary)
- ☐ Donor-Advised Fund
- ☐ Land or Real Property (please provide additional details in the “Gifts of Land and Real Property” section below)
- ☐ Other: \_\_\_\_\_

#### ***This provision is stated as:***

A specific dollar amount: \$ \_\_\_\_\_

A percentage: \_\_\_\_\_ % and I estimate the current value of this % to be \$ \_\_\_\_\_

Other: \_\_\_\_\_

The Columbia Land Conservancy will receive this gift:

- ☐ Upon my death
- ☐ Upon the death of my surviving spouse/partner

Name: \_\_\_\_\_

☐ Other: \_\_\_\_\_

## GIFTS OF LAND OR REAL PROPERTY

**Note:** Please complete this section if your type of gift selected above is “Land or Real Property”. Gifts of land or real estate may require environmental review, title review, appraisal, and approval by the organization’s Board or authorized committee prior to acceptance. The organization reserves the right to decline or negotiate the terms of any gift that would impose undue financial, legal, environmental, or stewardship obligations.

For gifts of land or conservation property, I/we understand that acceptance may depend on environmental condition, marketability of title, access, management capacity, and alignment with the organization’s conservation priorities at the time of transfer.

Property Address or Location: \_\_\_\_\_

County/State: \_\_\_\_\_

Approximate acreage: \_\_\_\_\_

Type of property:

- ☐ Conservation land
- ☐ Residential property
- ☐ Agricultural land
- ☐ Commercial property
- ☐ Other: \_\_\_\_\_

Any known restrictions, easements, or encumbrances:

\_\_\_\_\_

Additional notes about the property:

\_\_\_\_\_

(Attach additional documentation if available.)

## SUPPORTING DOCUMENTS

To help ensure your wishes are honored and your commitment is recognized with care and accuracy, please attach one of the following:

- ☐ A copy of the relevant pages of your will or trust, including the first page, the page naming Columbia Land Conservancy’s designation, and your signature page.
- ☐ A copy of the beneficiary designation form.
- ☐ Letter from my attorney, executor, or trustee confirming your intent
- ☐ Other

## DESIGNATION

Because future needs and circumstances can not always be predicted, restrictions on bequest gifts may limit our ability to use your generosity where it will have the greatest long-term impact; we encourage you to contact us to discuss your intentions so we can ensure your wishes are honored in a way that remains meaningful and practical over time.

- ☐ Unrestricted – to support Columbia Land Conservancy’s mission and priorities, as determined by the President and Board of Trustees

## DONOR RECOGNITION

Columbia Land Conservancy is proud to recognize individuals who make planned gifts as members of the Sycamore Circle. Please indicate your recognition preference:

- ☐ I/We are pleased to be recognized as members of the Sycamore Circle
- ☐ I/We prefer to remain anonymous at this time

## **FUTURE CONTACT INFORMATION**

To help facilitate your gift in the future, please share information about your executor, or another contact.

Executor Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

## **ACKNOWLEDGEMENT & SIGNATURE**

Columbia Land Conservancy gratefully accepts estate gifts that further its charitable mission. All estate gifts, including gifts of land or real property, are subject to review and acceptance in accordance with the organization's Gift Acceptance and Tradelands Policies and applicable laws and regulations.

By completing this form, I/we acknowledge that:

- This document expresses an intention to make a future gift and is not a legally binding obligation.
- Final acceptance of any estate gift is subject to review under the organization's policies in effect at the time the gift is realized.
- I/we understand that I/we should consult my/our own legal and financial advisors regarding estate planning decisions.
- I/we authorize Columbia Land Conservancy to contact me/us or my/our representatives for clarification regarding this gift intention if necessary.

Signature \_\_\_\_\_

Date \_\_\_\_\_

## **THE COLUMBIA LAND CONSERVANCY**

Thank you for your thoughtful support of the Columbia Land Conservancy.  
Each gift will be acknowledged in writing and accompanied by a receipt for your records.

For additional information or questions, contact  
Rachel Hoppins (Rachel.Hoppins@ColumbiaLand.org).  
The Columbia Land Conservancy is a 501(c)(3) charitable organization, EIN 22-2757332.

