



# CLC Legacy Circle

## Notice of Intent (non-binding and confidential)

**YES! I/we have made a planned gift to Chocorua Lake Conservancy in the following way:**

**My/Our future gift is from:**

- My/our will or living trust
- My/our IRA, other retirement account, or insurance policy
- My/our bank, brokerage, donor-advised fund, or another financial account
- Other \_\_\_\_\_

**Please estimate the current value of your bequest:**

- My/our bequest is stated as a percent (\_\_\_\_\_% ) or as an amount (\$\_\_\_\_\_ )
- My/our bequest is a Residuary Bequest which leaves the remainder of my/our estate to CLC after gifts to other beneficiaries have been made
- I/we wish to keep the value of my/our bequest private at this time

**Name(s):** \_\_\_\_\_

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

**Email(s):** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**I/We understand that this future gift makes me/us a member of the CLC's Legacy Circle and that the membership list may be published in CLC's publications.**

- Please list me/us as a Legacy Circle member in the following way and encourage others to join:  
\_\_\_\_\_
- I/We prefer to remain anonymous

**Your attorney will need our legal name and address:**

Chocorua Lake Conservancy, PO Box 105, 11 Runnells Hall Rd, Chocorua, NH 03817

Our Federal Tax ID Number is 02-0277083.

**Please return this form to:**

Chocorua Lake Conservancy  
PO Box 105, Chocorua, NH 03817

**Feel free to contact Alex Moot**

**with any questions or comments at:**

(781) 526-1572 (mobile)

[amoot@chocorualake.org](mailto:amoot@chocorualake.org)

## CLC Legacy Circle

The **CLC Legacy Circle** honors and recognizes the philanthropic leadership and vision of individuals who have created a planned giving strategy to sustain the future of Chocorua Lake Conservancy and ensure the protection of the Chocorua Lake Basin and attractive public lake access for generations to come.

### Step 1:

Name Chocorua Lake Conservancy in your will or living trust, as a beneficiary of your retirement account, insurance policy, or other financial account, or establish a charitable gift annuity. New commitments and previously established bequest plans qualify.

### Step 2:

Complete the non-binding Notice of Intent and return it to our office. Or complete the online PDF form on our website at [chocorualake.org/giftplanning](http://chocorualake.org/giftplanning) and email it to [amoot@chocorualake.org](mailto:amoot@chocorualake.org).

### What Gifts Qualify?

- Bequests from a Will or Trust
- Designating CLC as a beneficiary in your IRA, other retirement account, insurance policy, or other financial account
- Charitable Gift Annuity or Charitable Remainder Annuity Trust
- Specific asset or property (e.g. house, land, vehicle)

**Your legacy gift will protect more land today and far into the future.**

**Thank you!**

If you have any questions or need more information, please don't hesitate to contact Alex Moot, Executive Director, at (603) 323-6252 or [amoot@chocorualake.org](mailto:amoot@chocorualake.org).