

Join the Heritage Society

The Heritage Society provides a way for the Three Rivers Endowment Trust and Three Rivers College to recognize and celebrate the philanthropy of generous individuals who have made plans to address future needs in our communities. Please complete this form so we can honor you now for your future commitments to our community.

I/we have made a provision in my/our estate plans, and with this form I/we are informing the Three Rivers Endowment Trust of my/our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

Name(s): _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone Number: _____ Email: _____

Are you an alumni? Yes No
If yes, when did you attend? _____

I/we have made a provision to leave a legacy through my/our:

Bequest

Annuity/life income

Life insurance

Retirement plan or IRA

Other: _____

Name of professional advisor who assisted:

Optional: I/we wish to inform the TRET, for long-term planning purposes only, that the current value of my/our future gift is:

This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value.

I/we understand that by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time at my/our sole discretion.

Bequests of \$10,000 or more qualify to be established as a separate named fund. If this is the case, please indicate:

Desired name of the fund: _____

Purpose of the fund: _____

Heritage Society Recognition

I/we accept membership into the Heritage Society. You may recognize me/us in your list of Heritage Society members.

I/we accept membership into the Heritage Society but wish to remain anonymous.

Signature: _____ Printed Name: _____

Signature: _____ Printed Name: _____

Date: _____

