



## Legacy Society Confidential Membership Enrollment Form

The Legacy Society was created to recognize those who intend to make a planned gift to the Humane Society of Charlotte (HSC) by way of a will, trust, beneficiary designation or other giving arrangement. By their generosity, these special people have shown commitment to the work and future of HSC and will be remembered in perpetuity for their support. This form is non-binding and does not constitute a legal promise to make a gift. We understand that most estate gifts are revocable and your estate plans may change. We are asking for the information on this form for our recording keeping purposes only and any information provided will not be shared and will be kept in strict confidence.

Date \_\_\_\_\_

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Date of Birth(s) \_\_\_\_\_

**Please print your name(s) below exactly as you wish them to appear on donor walls and/or any documents or publications as it relates to the HSC Legacy Society** so that we may acknowledge your gift according to your wishes. If you choose, you may also indicate that you would like to remain anonymous.

\_\_\_\_\_

Contact Us At:  
Humane Society of Charlotte  
1348 Parker Drive, Charlotte, NC 28208  
Tax ID # 58 1342479  
704 494 7704  
plannedgiving@humanecharlotte.org

The Humane Society of Charlotte is included as a beneficiary in the following (check all that apply):

\_\_\_ Retirement Account

\_\_\_ Trust

- Date of Trust \_\_\_\_\_
- Trustee Contact Information \_\_\_\_\_

\_\_\_ Will

- Date of Will \_\_\_\_\_
- Trustee Contact Information \_\_\_\_\_

\_\_\_ Insurance Policy

- Name of Insurance Company \_\_\_\_\_

\_\_\_ Pet Guardianship Agreement

- If the Humane Society of Charlotte is being name as the guardian of your pet(s), a *Pet Guardianship Agreement* will need to be completed separately

\_\_\_ Other

Include notes on any of the above if applicable: \_\_\_\_\_

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**The Humane Society of Charlotte is a**

\_\_\_ Percentage amount beneficiary    \_\_\_ Dollar amount beneficiary    \_\_\_ Residual amount beneficiary

Estimated Value \_\_\_\_\_

*Estimated values will be held in strict confidence and will not be publicized.*

**Please submit any pertinent pages of your will or trust where the Humane Society of Charlotte is mentioned.**

As an expression of my commitment to improving the quality of life for animals and people in my community, I declare my intention to make a bequest to the Humane Society of Charlotte.

Signature(s) \_\_\_\_\_