



## How to Notify Ceres of Your Estate Gift Plans

Thank you for your generous bequest commitment to Ceres. We are excited to welcome you to the Joan Bavaria Legacy Society. Your legacy gift will help us to build a just and sustainable future for people and the planet.

This is a confidential record. To formalize your estate gift plans, we would like to know a brief description of the type of estate gift and your written estimate of the current value of your estate destined for Ceres. It is useful, but not mandatory, for us to receive a copy of the relevant section(s) of your estate document.

*We recognize that this does not constitute a binding commitment.* It simply permits us to record your estimated gift, recognize you for this intention, and more effectively manage the gifting process at the time of your estate settlement.

To notify Ceres of your intentions:

- Complete and sign the form below
- Retain a copy for yourself
- Return this document along with, if possible, a copy of the relevant sections of your estate documentation (e.g., will or trust) to:

**Ceres, 99 Chauncy St. Boston, MA 02111 or email [goff@ceres.org](mailto:goff@ceres.org)**

*For questions contact Jillian Farrell, [jfarrell@ceres.org](mailto:jfarrell@ceres.org) or 617-247-0700 ext. 310*



## Estate Gift Plans

Donor Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

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

Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

- I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.

### Type of Provision:

**Will/Trust**

- My Will/Trust provides that \_\_\_\_\_% shall be bequeathed to Ceres, Inc. through my estate. As of today's date, I estimate that the value of this provision in my estate plan would be approximately \$\_\_\_\_\_.
- My Will/Trust provides that \$\_\_\_\_\_ shall be bequeathed to Ceres, Inc. through my estate.
- My Will/Trust indicates that the bequest through my estate is unrestricted.

**IRA/Stock/Other (please describe the conditions and terms)**

\_\_\_\_\_  
\_\_\_\_\_

Ceres recognizes that the value may change due to unforeseen circumstances. This information will be used only to help Ceres project future financial support and *is not considered a legally binding obligation.*

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_