

3. My/our Legacy Gift is a:

- | | | |
|---|--|---|
| <input type="checkbox"/> Bequest under my/our Will(s) | <input type="checkbox"/> Beneficiary designation for: | <input type="checkbox"/> Retirement Account |
| <input type="checkbox"/> My/our revocable living trust(s) | <input type="checkbox"/> Transfer-on-death designation | <input type="checkbox"/> Life Insurance |
| <input type="checkbox"/> Transfer of real estate interest during my/our lifetime* | | <input type="checkbox"/> Annuity |
| <input type="checkbox"/> Transfer of privately held business interest during my/our lifetime* | | |
| <input type="checkbox"/> Charitable Lead Trust* | <input type="checkbox"/> Charitable Remainder Trust* | |
| <input type="checkbox"/> Remainder interest of irrevocable trust* | | |

*These types of gifts typically cannot be changed or undone once the gift asset is transferred to East Tennessee Foundation or the Trustee of an irrevocable trust. Please consult your attorney for specific questions or concerns.

I understand and agree to each of the following statements:

- A. This form does not, by itself, create a binding obligation on me, my estate, or my executor/beneficiaries/heirs.***
- B. Whether or not the gift described above can be changed or cancelled depends primarily on the language of the separate, legal document that created the gift and whether or not the gift item or funds have been delivered to and accepted by East Tennessee Foundation under applicable law.***
- C. East Tennessee Foundation and its employees cannot provide me with legal or tax advice and I should consult with my own attorney or accountant if I have questions or concerns regarding the legal status or tax effects of my gift.***
- D. The purpose of this form is merely to provide information to assist East Tennessee Foundation in recognizing its donors, better serving community needs, and, more importantly, understanding and implementing my/our wishes if and when this gift is completed.***

Signature: _____

Date: _____

Signature: _____

Date: _____