



## Valley Visionaries Membership Form

The **Valley Visionaries** has been established to recognize the extraordinary commitment of individuals who include the Valleys Planning Council in their estate plans. Members of the Valley Visionaries will be honored annually with a special event and in our various publications.

In the spirit of encouraging others to follow the example set by the Valley Visionaries, the VPC would like to publish your name alongside other members of the group as an incentive to others. The information you provide on this form will help the VPC in planning for the future. **All details you provide on this form are confidential and are not legally binding.** You may opt out of having your name published or made public by checking the box marked "Anonymous" below. The Valleys Planning Council is grateful for your investment in the future and for the impact it will have on the VPC's work to preserve and protect northwestern Baltimore County.

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

Address: \_\_\_\_\_ State: \_\_\_\_ Zip: \_\_\_\_\_

Preferred Phone: (     )     -     Email: \_\_\_\_\_

### Please choose one of the following:

- I understand that listing me among the members of the Valley Visionaries may be an incentive for others to give – I am willing to be publicly acknowledged.
- I wish to join the Valley Visionaries; however, I wish for my name to remain anonymous.

### I am pleased to join the Valley Visionaries based on the following (check all that apply):

- Bequest (listing amount is optional)
  - Specific bequest of a dollar amount \$ \_\_\_\_\_
  - Percentage bequest (estimated dollar amount) \$ \_\_\_\_\_
  - Residuary bequest (estimated dollar amount) \$ \_\_\_\_\_
  - Contingent bequest (estimated dollar amount in contingency) \$ \_\_\_\_\_
- Life Insurance (amount) \$ \_\_\_\_\_
- Retirement assets (estimated dollar amount) \$ \_\_\_\_\_
- Other estate gift (please specify) (estimated dollar amount):  
\_\_\_\_\_ \$ \_\_\_\_\_

**This gift to the VPC will come into effect:**

- At my death
- After the death of: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_\_

**I would like my gift to the VPC in my estate planning document to be directed towards:**

- Endowment Fund. These gifts will be held in perpetuity according to the VPC's investment policies; annual distributions of up to 3% of the fair market value of the Fund may be made to support the mission of the VPC.
  - General Charitable Purposes. These gifts provide the VPC with the most flexibility because they may be directed to the area of greatest need, as determined by the Board of Directors.
  - Restricted Purposes. These gifts require prior approval. Donors need to discuss in advance their desired special restriction to determine how best their wishes can be realized by the VPC.
- \_\_\_\_\_
- \_\_\_\_\_

I understand that I am not making a legal or binding commitment upon my estate by submitting this **Valley Visionaries** Membership Form. Further, the Valleys Planning Council should understand that the size of my future gift may be significantly different from the amount estimated above (if listed). If, for any reason in the future, the VPC is no longer included in my estate plan, I will notify the VPC so that they can update their records and remove me from the organization's planned giving records.

Signature \_\_\_\_\_ Date \_\_\_\_\_

*Thank you for your commitment to the Valleys Planning Council. For more information or questions, please contact Page Ward Seville, Development Director, at [page@thevpc.org](mailto:page@thevpc.org) or Reneé Hamidi, Executive Director, at [renee@thevpc.org](mailto:renee@thevpc.org), or by calling the VPC's office at 410-337-6877.*

*Please mail this form to the Valleys Planning Council, PO Box 5402, Towson, Maryland 21285.*