

# Real Estate Legacy Gift Proposal Form

Please complete this form to propose a legacy gift of real estate to our organization. This form is for planning and proposal purposes and does not constitute a final legal agreement.

## 1. Donor Information

Full Name of Donor(s):

Street Address:

City, State, Zip Code:

Telephone Number:

Email Address:

## 2. Real Estate Property Details

Property Street Address:

Property City, State, Zip Code:

Property Type (e.g., Residential, Commercial, Agricultural, Vacant Land):

Estimated Market Value (USD):

Outstanding Mortgages, Liens, or Encumbrances (If none, write "None"):

Current Owner(s) of Record (As listed on the deed):

## 3. Proposed Legacy Gift Structure

Type of Legacy Gift (e.g., Will/Bequest, Retained Life Estate, Charitable Remainder Trust):

Percentage of Property Interest to be Gifted (e.g., 100%, 50%):

Intended Use or Purpose of the Gift (e.g., General Endowment, Specific Program):

## 4. Professional Advisor Information (Optional)

Advisor Name (Attorney, CPA, or Financial Planner):

Firm Name:

Advisor Phone:

## 5. Signatures and Acknowledgement

By signing below, the donor expresses their non-binding intent to propose this real estate legacy gift for consideration.

Donor Signature (Printed):

Date: