



# Legacy Society Challenge Grant

- Yes! I/We can help Steep Rock Association receive an instant \$1,000 from the **Legacy Society** Challenge Grant. I/We have named Steep Rock Association as a beneficiary in my/ our will or estate plans, in the following way:

**My/our future gift is from:**

- Will or living trust
- Cash, bank, brokerage, donor advised fund or other financial account
- Retirement or Insurance Policy
- Other: \_\_\_\_\_

*Optional:* the estimated value of my (our) gift is \$ \_\_\_\_\_

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

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

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

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

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

I/We understand that this future gift makes me/us a member of Steep Rock Association's **Legacy Society** and that the membership list may be published in Steep Rock's publications and website.

- Please list me/us as a **Legacy Society** member in the following way:
- \_\_\_\_\_

- I/We prefer to remain anonymous.

**Your attorney will need our legal name and address:** Steep Rock Association Inc., 116 Christian Street, New Preston CT, 06777. Our Federal Tax ID Number is 06-6069060

Please return this completed form to: Steep Rock Association P.O. Box 279 Washington Depot, CT 06794. Contact our Development Director, Monica Roberto, with any questions or comments at: [monica@steeprocksoc.org](mailto:monica@steeprocksoc.org)



## Here's how the Legacy Society Challenge Grant Works

- Step 1:** Name Steep Rock Association, Inc. in your will or living trust or as a beneficiary of your established bequest plans.
- Step 2:** Complete the **Legacy Society Challenge Grant** form on the opposite side and return it to our office or email a signed copy to [monica@steeprocksoc.org](mailto:monica@steeprocksoc.org).

Our **Legacy Society** Challenge sponsors will make a gift of \$1,000 right now to Steep Rock Association in your honor. That's it. It's that easy!

### What Gifts Qualify:

- Will/Living Trust
- IRA/Retirement Account
- Charitable Remainder Trust
- Bank, Brokerage, or Other Financial Account
- Land

Your legacy gift is an investment in our future, allowing Steep Rock to continue its important work in conserving our natural landscapes, maintaining trails, and fostering environmental education for generations to come.

Thank you! For more information, please contact Monica Roberto at (860)868-9131x106 or [monica@steeprocksoc.org](mailto:monica@steeprocksoc.org).