

CARLISLE CONSERVATION FOUNDATION

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The CARLISLE CONSERVATION FOUNDATION  
is pleased to announce the formation  
of the *Spencer Brook Legacy Society*.

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Named for the first property protected by the Carlisle Conservation Foundation (CCF) in 1960, the *Spencer Brook Legacy Society* has been established to recognize those who have created a meaningful legacy by designating the Carlisle Conservation Foundation as a beneficiary in their Will, Trust, Life Insurance, or other Estate Plan. Membership is open to all, your gift can remain confidential, and there are no minimum requirements.

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Including CCF in your Estate Plan may enable you to make a contribution that might otherwise not be feasible; it costs you nothing today and ensures support for our mission in the future.

If you would like to become a member, please fill out the form on the back and return it to CCF. If you have any questions about CCF or the *Spencer Brook Legacy Society*, please speak with any CCF Board Member or visit us on the web at [www.carlisleconservationfoundation.org](http://www.carlisleconservationfoundation.org).

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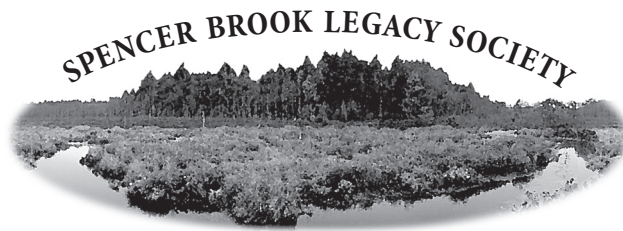
The Carlisle Conservation Foundation (CCF) is a non-profit, volunteer organization dedicated to maintaining the rural character of Carlisle and preserving its natural beauty and wildlife habitat. Working with private landowners, public entities, and other local and regional land conservation organizations, CCF serves as a resource and catalyst for land conservation, responsible land use, and community education about conservation.



CCF Board Members: Alan Ankers, Manuel Crespo, Wayne Davis, Lauree Eckler, Marjie Findlay, David Freedman, Peg Gladstone, Kelly Guarino, Heidi Haring, Steve Hinton, Chip Kakas, John Keating, John Lee, Victoria Rizzi, Dale Ryder, Steve Spang, Steve Tobin, Drew Williams

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Carlisle Conservation Foundation P.O. Box 300, Carlisle, MA 01741



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## MEMBERSHIP INFORMATION

- I would like to join the *Spencer Brook Legacy Society* with a bequest to CCF.
- I have already included CCF in my estate planning and would like to be a member of the *Spencer Brook Legacy Society*.
- I would like to speak to a CCF Board member to learn more about the *Spencer Brook Legacy Society* and planned giving options.

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

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***Please check one:***

- CCF may include my (and, if applicable, my spouse's) name in a bequest roster.  
(Neither type nor amount of bequest, if provided, will be included on the roster.) Please list me/us as follows:  
\_\_\_\_\_
- I would prefer that my support of CCF through the *Spencer Brook Legacy Society* remain anonymous.

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## WAYS TO CREATE A MEANINGFUL LEGACY

- ❖ Will
- ❖ Living Trust
- ❖ IRA or other Retirement Plan
- ❖ Life Insurance
- ❖ Charitable Trust

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***Choose the type of bequest that is right for you:***

- ❖ A Specific or General Bequest: *Specify a specific asset or amount of money.*
- ❖ A Percentage Bequest: *Specify a percentage of your estate assets.*
- ❖ A Residuary Bequest: *Specify a portion of the residual amount that is left in your estate after all specific bequests have been satisfied.*

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***Benefits of making a gift to CCF through your estate:***

- ❖ Including CCF in your estate plan ensures support for CCF beyond your own lifetime.
- ❖ Almost any kind of asset can be given, including cash, securities, personal property, and/or land.
- ❖ A charitable gift from your estate is deductible for federal tax purposes, with no limit on the amount of the deduction. It is also generally not subject to state inheritance or estate taxes.\*

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Sample language to include in your will: "I hereby give and bequeath to Carlisle Conservation Foundation, Inc., a non-profit corporation organized and existing under the laws of the Commonwealth of Massachusetts, \_\_\_\_\_ dollars (\$\_\_\_\_) [or \_\_ percent (\_\_%) or all of the rest, residue, and remainder of my estate] to be applied to the general uses and purposes of said organization." CCF Tax Identification Number for Beneficiary Designation Forms: 04-6112825

\*CCF encourages you to consult your financial and legal advisors when formulating your estate plan, and to discuss the purpose and intent of your gifts with a CCF Board Member to ensure that your wishes can be fulfilled by CCF.

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Return this form to a Board Member or mail to: **Carlisle Conservation Foundation P.O.Box 300, Carlisle, MA 01741**

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