



LEGACY SOCIETY CONFIDENTIAL MEMBERSHIP ENROLLMENT FORM

The Legacy Society was created to recognize those who intend to make a planned gift to Levine Museum of the New South (LMNS) by way of a will, trust, beneficiary designation or other giving arrangement. By their generosity, these special people have shown commitment to the work and future of LMNS and will be remembered in perpetuity for their support. This form is non-binding and does not constitute a legal promise to make a gift. We understand that most estate gifts are revocable and your estate plans may change. We are asking for the information on this form for our record keeping purposes only and will be kept in strict confidence.

Date _____

Name(s) _____

Address _____

City, ST Zip _____

Phone _____

E-mail _____

Date of Birth(s) _____

Please include your name(s) below exactly as you wish them to appear on donor walls and/or any documents or publications as it relates to the LMNS Legacy Society so that we may acknowledge your gift according to your wishes. If you choose, you may also indicate that you would like to remain anonymous.

If you have any questions, please contact Donna Stucker, Chief Development Officer at 704.333-1887 ext.2093 or via email at dstucker@museumofthenewsouth.org.

Levine Museum of the New South
P.O. Box 30125, Charlotte, NC 28230

Federal Tax ID# 56-1748648



Levine Museum of the New South is included as a beneficiary in the following (check all that apply):

☐ Retirement Account

Investment Firm _____

☐ Trust

Date of Trust _____

Trustee Contact Information _____

☐ Will

Date of Will _____

☐ Insurance Policy

Name of Insurance Company _____

Levine Museum of the New South is a:

☐ Percentage amount beneficiary Percentage _____

☐ Dollar amount beneficiary

☐ Residual amount beneficiary

Estimated Value _____

Estimated values will be held in strict confidence

Please submit any pertinent pages of your will or trust where
Levine Museum of the New South is mentioned.

As an expression of my commitment to ensuring history is not forgotten and remains
accessible for generations to come, I declare my intention to make a bequest to
Levine Museum of the New South.

Signature(s)
