

Declaration of Bequest Intention



By completing this form you signify your intention to name (your non-profit name here) as a beneficiary of your estate and your wish to become a member of (your legacy society name here if one exists), which honors those who have made legacy gifts to ((your non-profit name here). (Your non-profit name here) understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your vision and generosity.

I have named (your non-profit name here) as a beneficiary of: (Check as many as apply)

- My Last Will and Testament
- Retirement Account
- Revocable Trust (Living Trust)
- Charitable Trust
- Life Insurance Policy
- Donor Advised Fund
- Other (please specify) _____

My provision (s) names (your non-profit name here) as:

- Primary Beneficiary Secondary Beneficiary
- Contingent Beneficiary

I estimate that the total value of my gift to (your non-profit name here) through my estate will be \$ _____

If/when this gift is received by (your non-profit name here), it is my wish that the organization use my gift for the following purpose:

- General Purposes/Area of Greatest Need
- Other _____

I understand that my commitment to leave (your non-profit name here) a legacy gift through my estate entitles me to enrollment in (your legacy society name here), and special recognition during events and in publications.

- Yes, (your non-profit name here) may publish my name as a member of (your legacy society name here)
- I am pleased to become a member of (your legacy society name here), but I wish to remain anonymous and request that my name not be published in connection with my bequest intention

Signature

Printed Name

Date

Signature

Printed Name

Date

To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of your Will or Trust (or appropriate sections thereof) for safekeeping in our confidential files. Thank you.