BEQUEST INTENTION FORM

Confidential

Nature of Bequest

1. Please describe the nature of your bequest intention: (check all that apply)
* Will ☐ Revocable “Living” Trust ☐ IRA or Other Retirement Account
* Life Insurance Policy ☐ Charitable Remainder Trust ☐ Other (please describe)

Estimate

1. Please provide an estimate of the current value of your bequest intention: $ \_\_\_\_\_\_\_\_\_\_\_

Statement

1. In telling you of my/our intention, I/we do not intend to create any legal obligation to [ORGANIZATION] either personally or for my/our estate. It is simply a statement of my present intentions, and I have the option to change my plans at any time. I am providing this information solely to assist the [ORGANIZATION] in its future development plans.

Full name(s)

Address City State Zip

Signature(s) Date