

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

2. Please provide an estimate of the current value of your bequest intention:
\$ _____

Statement

3. 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

