

Confidential Gift/Bequest Intention Form

Thank you for including us in your estate plans. We are grateful to have the opportunity to thank you now - with the understanding that you may modify and/or revoke your plans in the future.

Would you be comfortable sharing some of the details of your gift? This will help us steward your future gift and your information will be kept in strict confidence. We will store this document in our Legal department files and not use it for any purpose other than stewarding any funds given.

Name: _____

Type of Bequest (check all that apply):

- ☐ Will ☐ Revocable Living Trust
- ☐ Retirement Plan ☐ Life Insurance Policy ☐ Bank Account
- ☐ Other (please specify) _____

Current Estimated Value*:

- ☐ Specific Amount: \$_____.
- ☐ Specific Percentage: _____%
- ☐ Although the actual amount will depend upon the value at my/our passing, I/we anticipate the gift will be approximately \$_____.
- ☐ Decline to state or unknown.

Specific Designations:

- ☐ Please apply my gift to Area of Greatest Need.
- ☐ Endowment.
- ☐ Please apply my gift as follows. I understand and agree that you will apply my future gift as designated, or to the closest area that is available at the time of the gift.

Percent Specify Your Gift Designation

_____	_____
_____	_____
_____	_____
_____	_____