



ESTES VALLEY LEGACY

A planned giving collaborative

Dear Donor,

We realize that many people who plan to support the nonprofit of your choice through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can say ‘thank you’ during your life, and we can confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding—we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Jerry S Kennell
Administrator/Planned Giving Counselor
Estes Valley Legacy
Phone: 970-480-7703
Email: estesvalleylegacy@gmail.com

Planned Gift Notification – Confidential

Personal Information

Name: _____

Spouse Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Date(s) of Birth: _____

Your Gift Intention

Please provide the following information and attach a copy of documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We want to support the mission of the nonprofit of your choice through a planned gift as described below:
- I/We have included a bequest for the nonprofit of your choice my/our will or living trust.
 - I/We have included the nonprofit of your choice as a beneficiary of an asset:
 - Retirement Plan
 - Bank, Investment, or Other Financial Account
 - Life Insurance Policy
 - Other: _____
 - I/We have included the nonprofit of your choice as a revocable/irrevocable (circle one) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ _____ or _____ % of my/our estate. *(If possible, please include a copy of the bequest language or other wording describing your planned gift.)*

General description of gift provision *(such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.)*:

- Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our **Legacy Society** listings *(please note the amount of your intended gift will not be published)*:

- No, please do not include me/us in listings.

Signature(s):

Date:

Return form to:

Jerry S Kennell
Administrator/Planned Giving Counselor
Estes Valley Legacy
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Phone: 970-480-7703
Email: estesvalleylegacy@gmail.com