

Date: ___/___/_____



Bequest Form

“Because our children deserve the best”

Congratulations! Your organization has been left a bequest by one of our clients. This is the only notification of their current charitable plan.

Note: This could change in the future at any time by this person.

NAME:	
ADDRESS:	
CITY, STATE, ZIP:	
TELEPHONE NUMBER:	
EMAIL ADDRESS:	

Does the donor need assistance getting their estate documents updated for this change?

YES or NO (Circle One)

	TYPE	CURRENT VALUE	INVESTMENT NAME
	Will bequest		
	Contingent bequest		
	Life Insurance/Annuity Bequest		
	Trust/IRA		

I want this money to go towards the general fund: _____

I want this money to go towards:

Professional Name: _____ Phone: _____