

Planned Giving Intention Form

Please use this form to share the details of your estate plan intention. This is for informational purposes only and your estate is not legally bound by submitting this form. *This information is held in strict confidence.*

NAME: _____ DATE OF BIRTH: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____ EMAIL: _____

I/we wish to inform you of my/our estate plan intentions

The estimated value of my/our gift is presently \$ _____ OR _____ % in the form of:

- | | | |
|--|---|---|
| ☐ Will or Trust Inclusion | ☐ Retirement Plan Assets (IRA, 403b, 401k, etc.) | ☐ Life Insurance |
| ☐ Charitable Gift Annuity | ☐ Charitable Remainder Trust | ☐ Real Estate |

I/we designate this gift

- | | | |
|--|--|---|
| ☐ Unrestricted – wherever needed most | ☐ Partner Home Building | ☐ Priority Home Repair |
|--|--|---|

Recognition

Print name(s) as you wish to have it/them appear in published the Legacy Builders list:

_____ or _____

- ☐ I/ We prefer my/our intentions to remain anonymous.

(Your name will not appear on the Legacy Builders list or other public recognition.)

SIGNED: _____ DATE: _____

SIGNED: _____ DATE: _____

Email completed form to: **PlannedGiving@habitatgtr.org** OR
Wendy Irvin, CEO, at **wendyi@habitatgtr.org** OR

Mail completed form to: Habitat GTR, PO Box 5412, Traverse City, MI 49696

Questions? call: 231-941-4663