

## Legacy Intention Form

I/we have made the following arrangements to name the Providence General Foundation as a beneficiary in my/our:

### Will or Trust

- Specific dollar amount (please specify below)
- The residue (all or part of what's left after providing for your loved ones)
- Percentage of our assets
- Specific item of value; please tell us about the item: \_\_\_\_\_

Please specify if your gift is:     Revocable                       Irrevocable                       Contingent

### Other Beneficiary Designation:

- Life Insurance Policy
- Retirement Plan (IRA, 401K, 403B, etc.)

The approximate value of my/our gift is \$ \_\_\_\_\_

### I/we would like this gift to be

- Directed to the area of greatest need at the time the gift is realized.
- I am interested in directing my gift to a specific fund or program. Please contact me.

Name \_\_\_\_\_ Spouse's Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Spouse's Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Mobile \_\_\_\_\_

Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please let us know how you would like your name listed in legacy recognition:                       Anonymous

**Thank you for supporting the mission of Providence. Please send completed forms to the address below.**

*Please note that this is not a legal document. It simply serves as a way for us to understand your intentions and recognize you for generously including Providence in your legacy planning. Most estate gifts are revocable and can be modified at any time. Please contact the Foundation if your intentions change or the value of your gift significantly increases or decreases.*