



Donor Intent

Donor's intent: (for the donor to complete)

Tell us what you would like future generations to know about you and why you have chosen to give this gift.

Please provide more details about your relationship to our organization so we can inform future generations about you and why our organization is important to you.

★What type of gift is the donor making?

- Specific or pecuniary bequest: a gift of a specific dollar amount or a particular asset of the estate. \$ _____ Describe

- Residuary bequest: a gift of all or part of the property remaining in the estate after debts, expenses and specific bequests have been paid, usually stated as a percentage. _____ % Estimated value today: \$ _____

- Contingent bequest: a bequest to take effect only if a condition precedent occurs, such as the death of another individual prior to the donor's death. _____ % Estimated value today: \$ _____

- Beneficiary designation of life insurance policy
Organization is applicant, owner and beneficiary or donor has irrevocably assigned ownership and beneficiary status of a paid up policy to organization, or donor has designated the organization as a beneficiary of the proceeds. \$ _____ Estimated value today: \$ _____

- Beneficiary designation of a retirement plan (e.g. IRA or qualified plan) Estimated value today: \$ _____

- Component part fund: will provides for the creation of a fund (donor-advised or endowment) at a community foundation that will provide income for organization. Estimated value today: \$ _____

- Charitable trust, will provides for the creation of a fund (donor-advised or endowment) at a community foundation that will provide income for our organization. Estimated value today: \$ _____

- Charitable remainder trust Estimated value today: \$ _____

- Charitable lead trust Estimated value today: \$ _____

- Donor prefers not to provide specifics but our organization is named in the will



Restrictions

Are there any restrictions on this gift?

No this gift is for general purposes or to be determined by the organization when gift matures.

Yes If yes, check all that apply below:

Gift to a designated fund or specific program. Describe: _____

Gift to be added to the principal of the existing Endowment Fund

Gift for the principal of a new endowment fund named:
For the purpose of:

Memorial designation in memory of:

Anonymous gift

Other please describe:

Recognition

Anonymous

Gift from:

Naming opportunity List here:

Does the donor wish to be listed as a legacy society member and receive all the benefits (annual special event, donor listing, etc.)

Yes

No

Are there any ways the donor wishes to remain involved in the organization?

What are the donor's wishes about ongoing communications with us (do they want all regular mailings, invitations to events, etc.)?

Are there any other organizations that will receive an estate gift from the donor's estate?

No

Yes

Prefer not to say

Number of other organizations: _____

If yes, what are the other organizations?

Prefer not to say



★How did the donor hear or learn about planned giving? Check all that apply.

Organization's published materials: newsletter, brochure, etc.	<input type="checkbox"/> No	<input type="checkbox"/> Yes
<i>Live On</i> advertisements	<input type="checkbox"/> No	<input type="checkbox"/> Yes
<i>Live On</i> Web site	<input type="checkbox"/> No	<input type="checkbox"/> Yes
From personal meeting with organization	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Speaker at a financial planning seminar	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Another donor	<input type="checkbox"/> No	<input type="checkbox"/> Yes
General knowledge/already knew/ my own idea	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Event	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Friend or family	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Legal or financial advisor	<input type="checkbox"/> No	<input type="checkbox"/> Yes

Signature of Donor

Signature of Solicitor

Date

Please fax completed form to Shawna Friedman, Rose Community Foundation 303-398-7430 or scan and email to sfriedman@rcfdenver.org.

Additional copies are available on the *Live On* web site liveonlegacy.org under resources, or by contacting Shawna at 303-398-7452 or sfriedman@rcfdenver.org.