

## LEGACY INTENTION FORM

Please complete this form to document your planned giving. Knowing your intentions helps The Church of Bethesda-by-the-Sea plan for the future. Your intent enrolls you as a member of the Cornerstone Society. Thank you!

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip-Code \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

### Gift Description:

- Will                       Trust                       Real Estate       Donor Advised Fund  
 Life Insurance            IRA or Retirement Plan  
 Other: \_\_\_\_\_

Notes/Additional Information: \_\_\_\_\_

**Optional:** Today's value of my future gift provision is approximately \$\_\_\_\_\_ with the understanding that future fluctuations/changes in the market/economy may have an impact on this current value.

**Optional:** Name of estate planning advisor (Attorney, CRP, other): \_\_\_\_\_

**Please use the following name(s) in all publications:** \_\_\_\_\_

- I/we wish to remain anonymous.

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

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

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For questions please contact:  
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