

REF

Rockford Education Foundation Legacy Society



Declaration of Future Intent

☐ **New** Intention ☐ **Updated** Intention

Thank you for your intention to include Rockford Education Foundation in your estate plan. We ask that you complete this form with as much detail as you are willing to share, as it is important to document your intent so that we can appropriately honor your gift. Any information about your gift will remain confidential and does not create a binding obligation.

Personal Information

Name: _____ Date of Birth: _____

Spouse's Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Gift Information

I/We have provided a gift to Rockford Education Foundation as set forth in my/our:

☐ Will or Living Trust

☐ Retirement Plan Beneficiary Designation
(IRA, 401k, 403b, Keogh)

☐ Other Beneficiary Designation
(Donor Advised Fund, Brokerage Account,
Checking/Savings Account, etc.)

☐ Life Insurance Policy

☐ Charitable Gift Annuity

☐ Charitable Remainder Trust

☐ Charitable Lead Trust

☐ Other Asset(s) (please describe): _____

☐ Rockford Education Foundation is a contingent beneficiary of the indicated asset above.

Please explain: _____

Gift Value

Please note that providing this information is a voluntary, non-binding, and confidential disclosure.

The current estimated value of my/our gift is \$_____ or _____%.

If a percentage is given, what is the current estimated value of the percent in today's dollars? \$_____

Gift Purpose

☐ It is my/our intention that our future gift be undesignated to support the greatest need.

☐ It is my/our intention that our future gift be designated to the following area: _____.

☐ I/We would like to speak with someone to discuss how to direct my/our gift for the greatest impact.

☐ I/We would like to establish a named endowment with my/our future gift.

Please continue to the reverse side to complete the form.

Recognition Preference

Donors who provide a planned gift to benefit the REF will be welcomed into the REF Legacy Society.

☐ I/we prefer no public recognition.

☐ Please list my/our name(s) as follows: _____

Estate Contact Information

Although optional, the following information is very helpful.

Executor/Trustee (if your gift is through a will and/or living trust)

Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Administrating Company (such as TIAA, Fidelity, etc., if your gift is through a retirement account or life insurance policy).

Name: _____ Company: _____

Address: _____ City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Additional Contact/Relationship (family member, attorney, etc.).

Name: _____ Relationship: _____

Address: _____ City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Signature(s)

I/We understand that I/we are not making a legal, or binding, commitment upon my/our estate by submitting this form, and any details about my/our gift will remain confidential. Furthermore, Rockford Education Foundation understands that the size of my/our future gift may differ from the amount estimated above for the purposes of valuation. If for any reason in the future the Foundation is no longer included in my estate plan, I/we will notify the Foundation so that their records can be updated and my/our names can be removed from the REF Legacy Society.

Signature 1: _____ Date: _____

Signature 2: _____ Date: _____

Please return this form directly to your Foundation contact or to

Rockford Education Foundation
PO Box 777
Rockford, MI 49341
ref@rockfordschools.org
616.863.6317

Learn more about Planned Giving Opportunities



rockfordEDfoundation.org/planned-giving

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FOUNDATION

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