

A Legacy Gift to the Foundation

Thank you for making provisions to include the Foundation in your financial planning. By completing and returning this form, it will allow us to properly thank you and recognize the gift in your lifetime, welcome you to the Bravo Legacy Circle, and make sure the gift will honor your wishes.

Information provided to signify your bequest intention to the Foundation will remain completely confidential unless you authorize us to publicize your gift. We understand that all bequest provisions are revocable, and any intentions stated here are not binding on you or your estate.

I have made revocable gift commitments for the Van Wezel Foundation as follows *(check all that apply)*:

- Bequest** Approximate value: \$ _____
- Life Insurance policy** Approximate value: \$ _____
- IRA or other retirement plan** Approximate value: \$ _____
- Other asset** Approximate value: \$ _____

Signature

Date

Name *(please print)*

Signature

Date

Name *(please print)*

Contact information – representative of my estate:

Name

Telephone

Role

Email

- I have attached documentation from my will, retirement plan, life insurance policy, or trust.

If your gift is for a percentage of your estate, rather than a fixed amount, the Foundation will be happy to use your good faith estimate of the current value based on this percentage. While not required, you may wish to include a copy of the relevant portion of related documents.