

Planned Gift Intention Form

Please use this form to share the details of your estate plan intentions for Albertina Kerr Centers Foundation. In recognition of your disclosure, we will be honored to invite you to join the Guardian Angels Society, a select group of individuals who have elected to create a future gift intention to support Albertina Kerr. This form is for informational purposes only. Your estate is not legally bound by submitting this form. *This information will be held in the strictest confidence.*

PERSONAL INFORMATION

Name: _____ Date of Birth: _____
Spouse's Name: _____ Date of Birth: _____
Address: _____
City: _____ State: _____ Zip Code: _____
Telephone: _____ Email: _____

GIFT SPECIFICS

As evidence of my/our desire to provide a legacy of support for Albertina Kerr I/we wish to inform the Foundation that you have been named in my/our estate plans: ☐ Will, ☐ Living/Revocable Trust, ☐ Irrevocable Trust, ☐ Life Insurance, or have been designated as a beneficiary of my/our: ☐ Individual Retirement Account (IRA), ☐ 401(k) or 403(b) ☐ Other Retirement Asset/Investment Account
Other: _____

Please describe your planned gift to the Albertina Kerr Centers Foundation (*for example - AK will receive a certain dollar amount or percent of named property*).

The approximate current value of this planned gift is \$_____ ☐ This is a "contingent" gift (AK is a secondary beneficiary).

Please describe the contingency: _____

PURPOSE

☐ Community Promise Fund ☐ This is an unrestricted gift ☐ This is a restricted gift

If this is a restricted gift, please describe _____

GUARDIAN ANGELS SOCIETY

In recognition of your intention, it is our pleasure to welcome you as a member of the Guardian Angels Society. This select group comprises those who have made a planned gift to Albertina Kerr.

☐ Yes, you may publicize my/our name(s) as members of the Guardian Angels Society, which serves as a motivation for others to consider planned gifts in support of Albertina Kerr.

☐ I/We prefer my/our intentions to remain anonymous.

COMMUNITY PROMISE RECOGNITION

To recognize your contribution to the Community Promise Fund and to the Community Promise Campaign, please indicate the minimum value of your commitment. The Minimum value of my/our commitment to the Community Promise Fund is \$_____.

I/We understand the Planned Gift Intention Form is not legal or binding. If our planned gift should change, we will notify Albertina Kerr. I/We understand that Community Promise Campaign recognition is based on the minimum committed value of a future gift. Albertina Kerr acknowledges that the future value of the gift may be significantly different than the current value.

Signature(s): _____ Date: _____