



Planned Gift Confirmation Form

Indian River Community Foundation expresses its appreciation for your commitment to support our community's future with a planned gift. Please take a moment to complete this confidential form and return it to us as a confirmation of your intentions:

I/We confirm the following planned gift to Indian River Community Foundation:

- Bequest
- Charitable Remainder Trust
- Charitable Gift Annuity
- Pooled Income Fund
- Beneficiary Designation of:
 - Retirement Account
 - Life Insurance
 - Investment Account
 - Annuity
 - Other: _____

Estimated \$ value of gift: _____

- Designation of gift: Indian River Community Foundation Unrestricted
- Fund Name: _____
- New Fund Name: _____

We welcome you as a member of the Alma Lee Loy Legacy Society, which was established in 2011 and recognizes donors who use Indian River Community Foundation to carry out their estate plans. Members of the Society have planned gifts today to provide benefits to our community in the future. Please indicate below how you would like your name to appear for recognition purposes or if you wish to remain anonymous.

- I/We grant you permission to publish my/our name(s) as follows:

(Please print your name as you would like it to appear in our recognition materials.)

- I/We wish to remain an anonymous.

Name Name of spouse (if applicable)

Address City, State Zip

Phone 1 Phone 2 Email

Date of birth (dd/mm/yyyy) Spouse date of birth (dd/mm/yyyy)

Signature Spouse's signature

Date Date