Planned Gift Intention Form

Thank you for wanting to create an enduring legacy through YWCA Boulder County. Including YWCA Boulder County in your estate plans makes you one of a special group committed to ensuring positive change for women and people of color now and in the future. Your gift will help us plan for the future as we provide lasting solutions to ensure peace, justice, freedom and dignity for all.

Please fill out this form so we can better understand your intentions for your gift.

The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Please note that all information provided will be kept in the strictest confidence and used for internal planning only. Questions? Contact Lisa Gills, Program Officer, Grants and Planned Giving, at 303-443-0419 x104 or email lgills@ywcaboulder.org.

Name(s):

Address:

Email/Phone:

Date of birth:

Please indicate the planned/deferred gift below:

\_\_\_ Beneficiary under my Will

\_\_\_ Trust Beneficiary

\_\_\_ Life Insurance Policy Beneficiary

\_\_\_ Retirement Plan/IRA Beneficiary

\_\_\_ Non-retirement Investment Account/mutual funds Beneficiary

\_\_\_ Stocks/Bonds Beneficiary

\_\_\_ Beneficiary of Other Assets, please list: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you are willing to share more information about your intended gift, please fill in all that apply and estimate the value of each gift in today’s dollars.

A specific amount: $\_\_\_\_\_\_\_

A specific asset: \_\_\_\_\_\_\_\_\_\_\_

A percentage of a residuary estate, trust: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is your gift contingent? If yes, please explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

YWCA Boulder County is grateful for your generous support and plans to recognize Planned Giving donors.

\_\_\_ Please recognize me/us as: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_ I/We wish to remain anonymous

Use of Gift:

Unrestricted gift to provide maximum flexibility for YWCA Boulder County to use for greatest need.

For a specific purpose, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please return form to:**

Lisa Gills, Program Officer, Grants and Planned Giving
YWCA Boulder County
2222 14th Street
Boulder, CO 80302
lgills@ywcaboulder.org \* 303/443-0419 x104

Signature(s) and Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name Signature and Date

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Print Name Signature and Date

**Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your giving intentions with your professional financial advisor. YWCA Boulder County is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Articles of Incorporation date June 23, 1959. Tax ID #84-0500276. Contributions are deductible as allowed by law.**