



# BEARCAT LEGACY FUND

## Planned Gift Intention Form

Thank you for your intention to include Hendersonville High School Alumni Association's **Bearcat Legacy Fund** in your estate plan. We ask you to complete this form with as much detail as you are willing to share. *All information provided will be kept strictly confidential and will be used for internal planning purposes only.*

### Donor Information:

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

### Gift Information:

I have provided a gift to the Hendersonville High School Alumni Association endowment ("Bearcat Legacy Fund") as set forth in my:

- |  |  |
|--|--|
| <input type="checkbox"/> Will or Trust         | <input type="checkbox"/> Charitable Gift Annuity       |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Charitable Remainder Unitrust |
| <input type="checkbox"/> Living trust          | <input type="checkbox"/> Other trust                   |
| <input type="checkbox"/> Retirement plan/IRA   | <input type="checkbox"/> Other                         |

Please add any other details you wish to share: \_\_\_\_\_

\_\_\_\_\_

The anticipated value of my gift will be approximately \$\_\_\_\_\_ or \_\_\_\_\_% of my estate. *(If possible, please include a copy of the bequest language or other wording describing your planned gift.)*

### Recognition:

Donors who provide a planned gift to benefit the endowment of the Hendersonville High School Alumni Association will become members of the Bearcat Legacy Society and receive appropriate recognition.

- I prefer no public recognition                       Please list my name as follows:

\_\_\_\_\_

I understand that this form does not create a binding obligation and any details about my gift will remain confidential. The Hendersonville High School Alumni Association understands that the size of my future gift may change.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_