

Planned Giving Society Sample

The Homestead Society at _____
has created the *Homestead Society* to promote and recognize all donors who have placed the <NAME OF ORGANIZATION> in their will or estate plan. Unless otherwise specified, gifts to the *Society* will be directed to support critical programs and services. *Homestead Society* members will be recognized in the following ways:

- Permanent recognition on a plaque
- <NAME OF ORGANIZATION> *Homestead Society* Certificate
- Listing in the <NAME OF ORGANIZATION> Annual Report and other communications

For record keeping and planning purposes we ask that members complete the information below and return it in the enclosed envelope.

I/we would like to be recognized in the Homestead Society.

I/we would like to remain anonymous.

I/we would like the gift to be unrestricted.

I/we would like to designate the gift for _____

Please indicate the type of gift: codicil in will/trust charitable annuity or trust

IRA beneficiary designation Life Insurance Other _____

Name _____

Address _____ City _____ State _____ Zip _____

Signature _____

Optional Information:

Please indicate the approximate value: \$ _____ or % of estate _____

For questions or more information about planned giving at <NAME OF ORGANIZATION>, please contact _____ at xxx-xxx-xxxx, or by email at <EMAIL ADDRESS>

Thank you for planning for <NAME OF ORGANIZATION>'s future!