



THE CHILDSERVE LEGACY SOCIETY
Statement of Intent for a Future Gift

As evidence of my/our desire to provide a legacy of support to ChildServe, I/we hereby inform the ChildServe Foundation that I/we have made provision for a gift in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

Name: _____ Birth Date: _____

Name: _____ Birth Date: _____

Description of Gift

- Bequest through will/trust
- Beneficiary of IRA or retirement plan (please describe): _____
- Beneficiary of life insurance policy (please describe): _____
- Charitable Gift Annuity (select one): Immediate Deferred
- Charitable Trust (select one): Unitrust Annuity trust Revocable trust Lead trust
- Other (please describe): _____

Optional

It is helpful to have any supporting documentation you may have on file with us. We hope that you will share details of your plans so we are able to recognize you appropriately.

I/We have provided will provide to the ChildServe Foundation a copy of the portion of my/our will(s) or other instrument that pertains to ChildServe.

I/we have a professional advisor and his/her name is: _____

With the understanding that values are subject to change, at this time I/we estimate the value of our gift to be approximately \$_____ in today's dollars or _____% of our estate.

I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract or revoke this bequest at any time, at my/our sole discretion.

Recognition

- Please recognize me/us in the ChildServe Legacy Society to recognize my/our generosity.

Please clearly print your name(s) for recognition:

- It is my/our intent this gift commitment remains anonymous. Please do not list my/our names publicly.

Donor Signature: _____ **Date:** _____

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The ChildServe Foundation and its employees do not provide tax or legal advice. Prospective donors should consult with their legal and financial advisors. If you have any questions, please contact **ChildServe CEO Teri Wahlig, MD** at **(515) 727-0290** or **DrTeriW@childserve.org**. For your reference, the ChildServe Foundation federal tax identification number is **42-1157665**.