



Mary Lyon Foundation’s Bequest Intention

I/We _____ confirm that I/we have made arrangements for following gift to the Mary Lyon Foundation.

Gifts (check all that apply)

- Cash
- IRA
- Real Estate
- Art/Collectibles
- Life Insurance
 - Whole Life
 - Universal Life
 - Term Life
- Investment/Bank Account Transfer on Death
- Other
- Will
- Living Trust
- Charitable Remainder Trust

A good-faith estimate of today’s value of my gift is \$_____

Definition of my gift: Specific dollar amount, percentage of estate, description of property, etc.

Timing

My gift will come to the Foundation

- After my death.
- After both my spouse/partner and I are deceased.

Membership

Membership in the Putnam Hill Legacy Society is automatically granted to anyone arranging for a gift to come to the Foundation through an estate. There is no minimum gift amount or age required to become a member.

I would like my name to appear in the Putnam Hill Legacy Society lists as follows:

I would like the name of my spouse/partner to appear as:

Please keep my name anonymous for Putnam Hill Legacy Society membership.

Documentation

In order to determine whether I am eligible for campaign credit, I have attached a page of my will, trust, beneficiary designation form, or other such instrument as evidence of my intention to make this gift to the Foundation. See back for requested documentation.

Designation

I hereby designate my gift for the general purposes of the Foundation unless I have stated a designation in my estate plan, Letter of Intent or a signed Statement of Understanding.

I agree to notify the Mary Lyon Foundation if my plans change so there is no gift for the Foundation in my estate. This Bequest Intention is not a pledge nor is it legally binding on me, my heirs, or my estate.

Signature(s)

Date



Requested Documentation to Receive Credit

Now for Your Future Gift

Notifying the Foundation about your future estate gift allows us to have a conversation now about how you would like us to use your gift in the future. If you are age 65+, you may also be eligible to receive campaign credit now for your future gift. To determine your eligibility, the Mary Lyon Foundation requests that you provide written documentation along with the signed Bequest Intention form.

Documentation may be submitted in the form of mailed photocopies, or emailed scans, computer screenshots, or legible photographs (including by cell phone) of estate-related documents that detail your future intention to support the Foundation. After reviewing the submitted documentation, the Foundation will notify you of your eligibility for donor credit to be awarded during your lifetime for your estate gift.

The Foundation fully respects the private and confidential nature of your estate plan. References to other beneficiaries may be redacted on the paperwork you provide to us. Documentation is not necessary in order to maintain membership in the Putnam Hill Legacy Society, only to receive campaign credit.

To properly record your intention, the Foundation respectfully requests:

1. This Bequest Intention form, completed and signed on the opposite side;
and
2. Documentation of your intended gift to the Foundation.

Bank Account

Copy of beneficiary page/statement and current account statement for percentage gifts

Charitable Remainder Trust

Copy of the trust and current trust account statement

Donor Advised/Charitable Fund

Copy of the beneficiary statement (downloaded or photographed) and current account statement for percentage gifts

Family /Private Foundation

Letter from donor indicating the amount requested from the foundation.

Investment Account

Copy of beneficiary statement and current account statement for percentage gifts

IRA/Retirement Account

Copy of beneficiary page/statement and current account statement for percentage gifts

Life Insurance Policy

Copy of beneficiary designation, and current policy statement indicating death benefit and any outstanding loans.

Will, Marital or Testamentary Trust

Copy of the page indicating the dollar amount or percentage gift to the Mary Lyon Foundation.

Questions? Contact Putnam Hill Legacy Society Chair Katherine McKay at
kmckay@marylyonfoundation.org or 508-529-3059