

BEQUEST INTENTION FORM

Thank you for including Mentoring Alliance as a beneficiary of a deferred gift. Please take time to complete this form with as much information as you are willing to share. Your legacy helps us plan for the future as we work to provide tangible help and eternal hope to kids and families throughout the generations. Any information about your gift will remain confidential and does not create a binding obligation.

New Intention

Updated Intention

My/Our Information:

Name (print): _____ Spouse name (if joint gift): _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email Address: _____

I/We have provided a gift to Mentoring Alliance through the following:

Beneficiary Designation

Estate Plans

Life Insurance

Will

Retirement Plan

Trust

Bank Account

Charitable Fund

Certificate of Deposit

Charitable Remainder Trust

Brokerage Account

Other: _____

Additional information, explanation, or gift restrictions (if any): _____

The current estimated value of my/our gift is \$ _____.

Additional Contact/Relationship you may want us to know (family, executor, attorney, etc.)

Name: _____ Relation: _____

Address: _____ City, State: _____

Zip Code: _____ Phone: _____ Email: _____

Signature: _____ Spouse (if Joint): _____

Date: _____

As with any decision regarding your assets, we urge you to see the advice of your professional counsel when considering a gift to Mentoring Alliance.